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# NATIONAL RECOVERY ADMINISTRATION

APR 8 1936

## DIVISION OF REVIEW

### EVIDENCE STUDY

NO. 4

OF

THE BUILDER'S SUPPLIES INDUSTRY

Prepared by

R. H. HOWARD

September, 1935

**PRELIMINARY DRAFT**

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## THE EVIDENCE STUDY SERIES

The EVIDENCE STUDIES were originally planned as a means of gathering evidence bearing upon various legal issues which arose under the National Industrial Recovery Act.

These studies have value quite aside from the use for which they were originally intended. Accordingly, they are now made available for confidential use within the Division of Review, and for inclusion in Code Histories.

The full list of the Evidence Studies is as follows:

- |                                     |   |
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| 2. Boot and Shoe Mfg. Ind.          | 24. Men's Clothing Industry               |
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| 19. Infant's & Children's Wear Ind. | 41. Waste Materials Ind.                  |
| 20. Iron and Steel Ind.             | 42. Wholesale & Retail Food Ind. (See No. |
| 21. Leather                         | 43. Wholesale Fresh Fruit & Veg. 31)      |
| 22. Lumber & Timber Prod. Ind.      |   |

In addition to the studies brought to completion, certain materials have been assembled for other industries. These MATERIALS are included in the series and are also made available for confidential use within the Division of Review and for inclusion in Code Histories, as follows:

- |                                    |  |
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| 44. Wool Textile Industry          | 49. Household Goods & Storage, etc. (Dropped)    |
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| 46. Baking Industry                | 51. Retail Tire & Battery Trade Ind.             |
| 47. Canning Industry               | 52. Ship & Boat Bldg. & Repairing Ind.           |
| 48. Coat and Suit Ind.             | 53. Wholesaling or Distributing Trade            |

L. C. Marshall  
Director, Division of Review

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## THE BUILDERS' SUPPLIES TRADE

### Foreword

Evidence presented herewith is based on Census data and statements of officials of the former Code Authority for the Builders' Supplies Trade. It was necessary in compiling the Census data to include both retail and wholesale establishments (as defined by the Census Bureau) in order to obtain approximate Code coverage.

The discrepancy between the Code Authority data and the Census data, which in the matters of employment and sales is great, is due to the difference between the Census classification and the Code definition of the Trade. The combined wholesale Census classification, "Lumber and Building Materials," and the retail Census classification of the same name, are roughly comparable with the Trade as defined by the Code, but include some types of establishments whose major lines of business was not covered by the Code. In the wholesale field these establishments consisted of dealers in "lumber and millwork" and "glass," both of which have been excluded from the Census data cited in this report. Insofar as these dealers carry the building supplies listed in Chapter I of this Study as coming under this Code, this exclusion is too broad. In the retail field, two subgroups, "lumber and building material dealers" and "lumber and hardware dealers" could not be broken down - even for the year 1929 when the published breakdowns were fairly complete - to exclude the lumber business, which was covered in another code definition. As this in particular amounts to a large proportion of the business done by establishments in the Census classification used, the data cited for this group are exaggerations of the extent of the Trade as defined by the Code. 1/

Another factor which makes Census data non-comparable with Code Authority data is that in the Census tabulations each establishment - its employees, payroll, sales, etc. - is put in only one classification, according to the major portion of its business. Therefore an establishment whose major business was in builders' supplies, as defined by the Code, but which also carried other materials not covered by the Code definition of the Trade, such as lumber, coal, etc., would be included in its entirety in the Census classification used, while the Code Authority data pertain only to that portion of such a business as actually came under the Trade as codified.

Despite the various limitations of the Census data, they are believed to be sufficiently representative of the Trade, as defined by the Code, to be used in a study of this kind. These data were collected in only two years, 1929 and 1933.

The Code Authority data used herein were furnished by Mr. L. I. MacQueen, formerly Secretary of the Code Authority for the Builders' Supplies Trade, who made estimates based on the results of questionnaires sent to the Trade in 1934, and estimates based on his general knowledge of the Trade gained by many years of experience as an official of builders' supplies trade associations.

Due to the inapplicability of parts of the outline for Evidence Studies to non-manufacturing activity, and to lack of pertinent data, several of the topics listed in the first five sections of the Outline and all of those listed in Section VI have not been covered in this report.

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1/ The particular subgroups used in selecting Census data are indicated





## Chapter I

### NATURE OF THE TRADE

#### Code Definition

The Builders' Supplies Trade is defined in the Code 1/ as follows:

"Builders' Supplies. - The term 'Builders' Supplies' as used herein is broadly defined as those products used in building and construction work and commonly designated as fire resistant. The term 'Builders' Supplies' as used herein specifically comprehends the following products:

"Brick Mortars, Casement and Steel Sash, Cement and Cement Products, Cement Pipe, Ceramic Tile, Clay Roof Tile, Common Brick Cut Stone, Dampers and Fireplace Accessories, Drain Tile, Face Brick, Fire Brick and Clay, Glazed Structural Tile, Gypsum Products, Hollow Tile, Lime and Lime Products, Mineral Aggregates, Mortar and Cement Colors, Molding Plasters, Roof and Flooring Slates, Sewer Pipe, Flue Lining and other Clay Products, Structural Terra Cotta and Waterproofing Compounds."

#### Total Number of Establishments

Code Authority Data. - The Secretary of the Code Authority states that in 1934 there were 30,000 establishments which handled a sufficient volume of builders' supplies to be subject to the Code.

Census Data. - As explained in the Foreword of this report, Census data do not exactly fit the Trade as defined in the Code. By selecting the Census classification which approximately fit the Code definition, it was found that in 1929 there were about 28,000 establishments and in 1933 about 22,000. (See Table I below.)

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1/ This definition is contained in Amendment No. 2, approved October 25, 1934. The Code was approved on October 3, 1933.





TABLE I  
BUILDERS' SUPPLIES TRADE  
Total Number of Establishments in 10 Principal Trade  
States, 1929 and 1933

State	1929			1933		
	Retail a/	Whole- sale b/	Total Number	Per Cent	Retail a/	Whole- sale b/
U. S. Total	26,377	1,885	28,262	100.0	21,015	1,235
New York	1,757	292	2,049	7.3	1,231	155
Texas	1,851	61	1,912	6.8	1,525	51
Illinois	1,643	131	1,774	6.3	1,243	76
Ohio	1,505	201	1,706	6.0	1,048	112
Pennsylvania	1,533	143	1,676	5.9	911	95
California	1,229	163	1,392	4.9	1,202	101
Iowa	1,354	22 c/	1,376	4.9	1,123	25
Missouri	1,099	92 c/	1,191	4.2	825	51
Minnesota	1,142	29 c/	1,171	4.1	991	21
Kansas	1,097	16 c/	1,113	3.9	912	20
Total 10 States	14,210	1,150	15,360	54.3	11,011	707
Total Other States	12,167	735	12,902	45.7	10,004	528
Source:	Census of Retail Distribution, 1929 and 1933; and Census of Wholesale Distribution, 1929 and 1933.					

a/ Consists of lumber and building material dealers, lumber and hardware dealers, roofing dealers, and other dealers (brick, stone, cement, etc.)

b/ Consists of wholesalers proper of lumber and building materials, exclusive of lumber and millwork dealers, and of glass dealers. In 1933 wholesalers whose annual volume was less than \$1,000 were not included in the Census data.

c/ Includes wholesalers of glass.



## Number of Establishments by States

The establishments were widely spread over the country. The number in the ten most important states listed in order of their importance on the basis of number of establishments in 1929 are given for 1929 and 1933 in Table II below.

## Number of Members

The number of members of the Trade and the number of establishments were approximately the same, according to the Secretary of the Code Authority.

## Failures

Data on the number and liabilities of failures in the Trade as defined by the Code are not available. However, Dun and Bradstreet have compiled failure statistics for two groups of establishments which handled builders' supplies along with other materials not included by the Code definition. These data are believed to be sufficiently representative of the Trade to indicate at least a trend. They are given in Table II below for the years 1933 and 1934. Data for other years are not available.

TABLE II

Number and Liabilities of Failures in Building  
Supply Establishments, 1933 and 1934

Type of Establishment a/	Number of Failures		Liabilities	
	1933	1934	1933	1934
Lumber and Building Materials	168	82	\$9,655,146	\$1,571,691
Stone, Clay and Glass	154	54	3,102,170	2,141,864
Total	322	136	12,757,316	3,713,555

Source: Compiled from data reported monthly in the Dun and Bradstreet Monthly Review.

a/ Both retail and wholesale establishments are included.

## Value of Sales

Code Authority Data. - Estimates of the value of sales in the years 1929, 1931, 1933, and 1934 were supplied by the Secretary of the Code Authority, together with a breakdown of the total sales by six principal kinds of materials. These data are contained in Table III as follows:



TABLE III

Estimated Sales, by 6 Principal  
Kinds of Materials  
(In Thousands)

Kind of Material	1929	1931	1933	1934
Cement	\$247,500	\$135,000	\$56,250	\$63,000
Clay Products	82,500	45,000	18,750	21,000
Plaster	55,000	30,000	12,500	14,000
Sewer Pipe	41,250	22,500	9,380	10,500
Mineral Aggregates <u>a/</u>	41,250	22,500	9,370	10,500
Lime	27,500	15,000	6,250	7,000
Other	55,000	30,000	12,500	14,000
Total	550,000	300,000	125,000	140,000

Source: Code Authority for Builders' Supplies Trade  
a/ Sand, gravel, and crushed stone.

Census Data. - Sales made by the establishments in the Census classifications selected amounted to \$2,447,653,000 in 1929 and \$718,024,000 in 1933. (See Table XII below). The discrepancy between these figures and those for the comparable years submitted by the Code Authority is obviously wide and is due principally to the inclusion in the Census data of the sales of those materials that were not included in the Code definition, the principal one of which is lumber, the production and sale of which product was covered by other Codes.

#### Competing Products

The following products, according to the Secretary of the Code Authority, compete with the products handled by the Trade: lumber, ready-mixed concrete, concrete block, and concrete pipe.

#### Retail Prices of Building Material

Indices of retail prices of building materials covering the period September 1921, to March 1935, as prepared by the Research and Planning Division, NRA, are included in the appendix of this report. Some of the charts depict the trend in the price of materials which were not included under the Code definition of the Builders' Supplies Trade, and such charts are marked with an asterisk in the list of charts placed at the beginning of the appendix.





Chapter II

LABOR STATISTICS

Number of Employees

Code Authority Data. - Estimates of the number of full-time employees engaged in the Trade, made by the Secretary of the Code Authority, are given in Table IV as follows:

TABLE IV

Estimated Annual Average Number of Full-Time Employees

Year	Average Number of Full-Time Employees
1929	500,000
1931	450,000
1933	200,000 <u>a/</u>
1934	220,000

Source: Code Authority for Builders' Supplies Trade.

a/ Average for first 9 months.

Census Data. - Figures on the total number of employees as compiled from the Census data for the classifications selected as being most closely comparable with this Trade are given in Table V, below.

It is seen that employment fell off approximately 47 per cent in the country as a whole between 1929 and 1933. As part-time employees and employees of establishments whose annual business amounted to less than \$1,000 are not included in the data for wholesale establishments in 1933, the actual decline was slightly less than that shown by this table.

Although Census data showed sales to be considerably higher than those submitted by the former Code Authority, the Census figures on employment are considerably lower than the Code Authority's. This situation is probably due mainly to the difference in method used in compiling the two sets of data. The former Code Authority's data are merely estimates, and, as has been pointed out above, the Census data are for classifications which do not exactly fit the Code definition of the Trade. Part of the discrepancy is probably due to the fact that an unknown proportion of the employees of wholesale dealers in lumber and millwork, and of glass were presumably covered by the Code.

Number of Employees by States

Table V, supra, which lists the ten most important states in the order of their importance on the basis of employment in this Trade in 1929, shows a concentration of employment in these states. Almost 59 per cent of the employees were employed in these ten states in 1929 and approximately 54 per cent were employed there in 1933.





TABLE V  
Total Number of Employees in 10 Principal States, 1929 and 1933 a/

	1929				1933			
	Retailb/		Wholesalec/		Retailb/		Wholesalec/	
	Full Time	Part Time	Number	Per Cent	Full Time	Part Time	Number	Per Cent
U.S. Total	134,483	15,076	28,645	100.0	64,613	19,589	10,116	94,318 100.0
New York	13,323	764	5,738	11.1	5,453	1,238	1,335	8,026 8.5
Pennsylvania	9,829	1,006	2,872	7.7	3,223	1,492	680	5,395 5.7
Ohio	8,996	797	2,710	7.0	3,487	1,189	848	5,524 5.8
Illinois	8,873	877	2,661	7.0	4,298	1,249	693	6,240 6.6
California	8,473	686	1,551	6.0	4,323	1,290	1,436	7,043 7.5
Michigan	7,418	533	1,033d/	5.0	2,577	712	171	3,460 3.7
Texas	6,801	885	870	4.8	3,651	892	351	4,894 5.2
New Jersey	5,750	216	574d/	3.7	2,525	555	109	3,189 3.4
Wisconsin	4,960	685	577	3.6	2,696	946	147	3,789 4.0
Iowa	3,674	947	311	2.8	2,022	665	226	2,913 3.1
Total, 10 States,	78,097	7,396	19,197	58.7	34,255	10,228	5,996	50,473 53.5
Total, Other States	56,386	7,680	9,448	41.3	30,358	9,361	4,120	43,845 46.5

Source: Census of Retail Distribution, 1929 and 1933; and Census of Wholesale Distribution, 1929 and 1933.

a/ Employees include salaried persons and wage earners.

b/ Consists of lumber and building material dealers, lumber and hardware dealers, roofing dealers, and other dealers (brick, stone, cement, etc.).

c/ Consists of wholesalers proper of lumber and building materials, exclusive of lumber and millwork dealers, and of glass dealers. In the 1929 data part-time and full-time employees are included; in the 1933 data part-time employees and employees of establishments whose business amounted to less than \$1,000 that year are excluded.

d/ Employees of wholesalers of glass are included.



TABLE VI  
Total Annual Payrolls in 10 Principal Sales States, 1929 and 1933 <sup>a/</sup>  
(In thousands)

State	1929			1933		
	Retail <sup>b/</sup>	Wholesale <sup>c/</sup>	Total Amount    Per Cent	Wholesale <sup>c/</sup>	Total Amount    Per Cent	
U. S. Total	\$222,854	\$53,772	\$276,626    100.0	\$15,390	\$102,612    100.0	
New York	24,422	12,676	37,098    13.4	2,418	11,178    10.9	
Illinois	16,759	5,770	22,529    8.1	1,156	7,280    7.1	
Pennsylvania	15,937	5,768	21,705    7.8	1,112	5,811    5.7	
Ohio	15,493	4,411	19,904    7.3	1,302	5,952    5.8	
California	14,777	2,969 <sup>d/</sup>	17,746    6.4	2,281	9,404    9.2	
Michigan	14,184	2,021	16,205    5.9	240	3,413    3.3	
Texas	10,705	1,319	12,024    4.3	581	5,083    4.9	
New Jersey	10,486	1,257 <sup>d/</sup>	11,743    4.2	210	4,204    4.1	
Wisconsin	7,772	1,758	9,530    3.4	211	3,783    3.7	
Iowa	5,801	403	6,204    2.3	287	2,948    2.9	
Total, 10 States	136,336	38,352	174,688    63.1	9,798	59,056    57.6	
Total, Other States	86,518	15,420	101,938    36.9	5,592	43,556    42.4	

Source: Census of Retail Distribution, 1929 and 1933; and Census of Wholesale Distribution, 1929 and 1933.

<sup>a/</sup> Payroll figures are for salaried employees and wage earners, both part-time and full-time.

<sup>b/</sup> Consists of lumber and building material dealers, lumber and hardware dealers, roofing dealers, and other dealers (brick, stone, cement, etc.).

<sup>c/</sup> Consists of wholesalers proper of lumber and building materials, exclusive of lumber and mill-work dealers, and of glass dealers. In 1933 data, the payrolls of those wholesale establishments whose business was less than \$1,000 in that year are not included.

<sup>d/</sup> Includes payrolls of wholesalers of glass.



## Total Annual Payrolls

Data on payrolls were not furnished by the former Code Authority. Census data for the selected classifications of establishments are given for the United States and the ten most important states in Table VI, below. The figures show that in the United States as a whole there was a decline in payrolls in this Trade between 1929 and 1933 of about 63 per cent -- a greater decline than that in number of employees. The decline would have been shown to have been smaller if the payrolls of those wholesale establishments whose business was less than \$1,000 during 1933 had not been excluded from the 1933 data.

## Annual Payrolls by States

Table VI below shows a slightly greater concentration of payrolls in the ten leading states for this Trade than in the number of employees. In 1929, these ten states accounted for about 63 per cent of the total payroll, and, in 1933, approximately 58 per cent.

## Ratio of Labor Cost to Net Sales

From the Census data it is possible to obtain an approximation of the proportion that labor cost is of the total value of sales made by the Trade. Since the Census data are not entirely representative of the Trade, this ratio cannot be accepted as strictly accurate. The data, which are given in Table VII, below, show that payrolls constituted about 11 per cent of net sales in 1929 and 14 per cent in 1933.

TABLE VII

Ratio of Total Payrolls to Net Sales, 1929 and 1933

Year	Total Payrolls (000,000's)	Net Sales (000,000's)	Per Cent Payrolls are of Net Sales
1929	\$277	\$2,448	11.3
1933	103	718	14.3

Source: Census data, as given in Tables VI above and XII, below.

## Hours Worked

The average number of hours worked per week per employee was estimated by the Secretary of the former Code Authority to have been 55 in 1929, 40 in 1931, and 25 in 1933 and 1934.

The same authority estimated that the average number of weeks worked per year was 50 in 1929, and 40 in 1934.

## Child Labor

According to the Secretary of the former Code Authority, there were few workers in the Trade under 16 years of age before the adoption of the Code and none reported during its operation.





# Chapter III

## MATERIALS

### Kinds and Cost of Materials Sold

This Trade uses no materials in the production of goods. The total amount spent by the Trade in the purchase of materials for resale was estimated by the Secretary of the former Code Authority to have been \$357,500,000 in 1929, and \$84,000,000 in 1934. These amounts are 65 per cent and 60 per cent of sales in the respective years, as estimated by the same authority. Delivery costs, according to the Secretary, averaged 20 to 26 per cent of sales.

A breakdown of the total amount spent for six principal kinds of materials was also furnished by the Secretary and is given in the following table.

TABLE VIII  
Estimated Cost of Materials, By 6  
Principal Kinds, 1929 and 1934  
(In thousands)

Kind of Material	1929	1934
Cement	\$160,875	\$37,800
Clay Products	53,625	12,600
Plaster	35,750	8,400
Sewer Pipe	26,812	6,300
Mineral Aggregates <u>a/</u>	26,813	6,300
Lime	17,875	4,200
Other	35,750	8,400
Total	357,500	84,000

Source: Code Authority for Builders' Supplies Trade.

a/ Sand, gravel and crushed stone.

### Importance of the Trade as a Distributing Agency

Some idea of the importance of this Trade in the field of distribution may be obtained from the data contained in a publication of the Bureau of the Census, Distribution of Sales of Manufacturing Plants, which covers 1929. Data have been selected from this report which show the proportion which the sales made by manufacturers of five principal building materials to wholesalers and retailers are to the total sales to all distributing agencies. While the figures are given for all wholesalers and retailers of the various materials selected, including those establishments that were not under the Code, it is believed that the major portion of the sales made to wholesalers and retailers were made to the type of establishments which came under the amended definition. The data given in Table IX below show that approximately three-fourths the total sales of cement, fire brick, hollow





building tile, and wall plaster were made through wholesalers and retailers. In the case of common brick, about 40 per cent was so sold.

TABLE IX  
Sales to Wholesalers and Retailers, by Manufacturers of  
5 Principal Building Materials, 1929

Material	Total Sales <u>a/</u> (000's)	Sales to Wholesalers and Retailers <u>b/</u>	
		Amount (000's)	Per Cent of Total Sales
Cement	\$255,604	\$196,539	76.9
Common Brick	40,192	15,756	39.2
Face Brick	17,852	11,441	64.1
Hollow Building Tile	18,015	12,507	69.4
Wall Plaster, etc. <u>c/</u>	70,663	56,201	79.5

Source: Bureau of the Census, Distribution of Sales of Manufacturing Plants, 1929.

a/ Total sales include the sales made to all types of distributing agencies, including, in addition to wholesalers and retailers, manufacturers' own wholesale and retail branches, sales agents, brokers, and commission houses. They also include sales made direct to industrial and other large consumers (manufacturers, railroads, contractors, etc.). The data for cement and wall plaster do not include the sales of establishments whose products were valued at less than \$5,000.00 in 1929. The other sales data are for all establishments regardless of size.

b/ As here used, wholesalers and retailers include certain types of establishments which were not under the Builders' Supplies Trade Code, such as lumber yards, as well as those which were under this Code.

c/ Wall plaster, wall board, insulating board, and floor composition.

#### Geographical Source of Materials

Data which show the production by leading distributing states of eight principal materials distributed by this Trade were selected from the Census of Manufactures report for 1929 and are given in Table X, which follows.



TABLE X

## Production of Chief Materials, Distributed by Principal Distributing States, 1929

State	Portland Cement		Wall Plaster, a/ Wall Board, Etc.		Sewer Pipe		Common Brick		Face Brick		Hollow Building Tile		Drain Tile		Lime, Hydrated and Quick		State
	In Thousand Barrels	Per Cent	In Thousand Dollars	Per Cent	In Thousand Tons	Per Cent	In Millions	Per Cent	In Millions	Per Cent	In Millions	Per Cent	In Thousands	Per Cent	In Thousand Tons	Per Cent	
U. S. Total	169,868	100.0	\$70,663	100.0	1,675	100.0	5,505	100.0	2,139	100.0	3,318	100.0	859	100.0	3,256	100.0	U. S. Total
California	12,965	7.6			82	4.9	288	5.2									California
Illinois							836	15.2	220	10.3	280	8.4	137	15.9			Illinois
Indiana					122	7.3			130	6.1			116	13.5			Indiana
Iowa			4,516	6.4							234	7.0	200	23.3			Iowa
Michigan	13,326	7.8	3,944	5.6									43	5.0			Michigan
Missouri					84	5.0									318	9.8	Missouri
New Jersey											434	13.1					New Jersey
New York	10,743	6.3	17,290	24.5			764	13.9									New York
Ohio	9,144	5.4	3,920	5.5	697	41.6	260	4.7	501	23.4	745	22.5	272	31.7	568	17.4	Ohio
Pennsylvania	39,310	23.1			263	15.7	418	7.6	466	21.8	253	7.6			425	13.0	Pennsylvania
Tennessee															168	5.2	Tennessee
Texas			3,841	5.4					96	4.5							Texas
West Virginia															241	7.4	West Virginia
Total, 5 Leading States Producing These Items	85,488	50.2	33,511	47.4	1,248	74.5	2,566	46.6	1,413	66.1	1,946	58.6	768	89.4	1,720	52.8	Total, 5 Leading States Producing These Items
Total, Other States	84,380	49.8	37,152	52.6	427	25.5	2,939	53.4	724 4	33.9	1,140	34.4	91	10.6	1,605	49.3	Total, Other States

Source: Census of Manufactures, 1929, Volume II. Data for the three groups, cement, wall plaster, and lime do not cover establishments having an annual production of less than \$5,000

a/ Data are for value, not volume. Gypsum board, gypsum and other plaster, fibre wall and insulating board and floor composition are included.



The volume of production of the materials selected is shown -- except in the case of wall plaster, etc., where sales figures only were available --- for the five states leading in their productions, along with the percentage which each state's production is to the total of the United States. While the materials are produced in nearly all states, it is evident from the data that there is a marked geographical concentration in the production of these materials.

Imports of Materials. - Imports of building materials amount to a small proportion of United States production. In 1929, 1,723,000 barrels of cement were imported, 1/ amounting to about one per cent of United States production in that year. In the same year, 32,348 tons of lime and crude limestone were imported, 1/ which amounted to about one per cent of the United States production of finished lime.

According to the Secretary of the former Code Authority, the chief sources of imported cement were Belgium, Poland, Czechoslovakia, and Sweden; of lime, Canada.

---

1/ Bureau of Foreign and Domestic Commerce, Foreign Commerce and Navigation of the United States, 1929.



## Chapter IV

## SALES

Sales by States

The Trade is nationwide in scope and sales are made in every state, but more than half of the sales are made in ten states, as will be seen from Tables XI and XII, below.

Code Authority Data. - The former Code Authority, in applying for approval of its budget, submitted a table showing the estimated sales, by states, for the period October, 1933, to September, 1934. This table has been reduced to show the sales in the ten leading states, in order of their importance in sales, as follows:

TABLE XI

Estimated Total Sales in 10 Principal States,  
October 1933 to September 1934 (inclusive)  
(In thousands)

State	Sales	
	Amount	Per Cent of Total
U. S. Total	\$118,603	100.0
New York	9,200	7.8
Illinois	9,000	7.6
Ohio	8,353	7.0
Pennsylvania	7,373	6.2
California	7,347	6.2
Missouri	6,500	5.5
Kansas	3,750	3.2
Michigan	3,719	3.1
Texas	3,534	3.0
New Jersey	3,000	2.5
Total, 10 States	61,776	52.1
Total, Other States	56,827	47.9

Source: Budget Application, submitted by Code Authority for Builders' Supplies Trade.

Census Data. - Census data on the sales of the establishments in the classifications selected are given in Table XII for the calendar years 1929 and 1933.

While the periods covered by Tables XI and XII are not the same, the discrepancy between the Census and Code Authority figures cannot be assigned to this cause alone. The major discrepancy lies in the two factors heretofore mentioned -- the non-comparability of the Census classification and the Code definition and the fact that the former Code Authority's data are





estimates. It may be noted, however, that both tables show a concentration of sales volume in a limited number of states, and that eight of the ten most important states in sales are identical in both sets of data.

#### Extent of Interstate Business

There are no comprehensive data available on the extent of the interstate business carried on by this Trade. However, some data have been selected from Census reports which may serve as an indication of the extent of this phase of the Trade.



TABLE XII

Total Net Sales in 10 Principal States, 1929 and 1933  
(In thousands)

State	1929		1933	
	Retail <sup>a/</sup>	Wholesale <sup>b/</sup>	Retail <sup>a/</sup>	Wholesale <sup>b/</sup>
	Amount	Per Cent	Amount	Per Cent
U.S. Total	\$1,981,284	100.0	\$603,416	\$114,608
New York	210,526	12.9	56,726	16,784
Illinois	139,337	7.7	40,794	7,550
Pennsylvania	117,620	6.7	28,857	7,765
California	126,669	6.4	42,316	18,473
Ohio	115,963	6.3	28,447	10,988
Texas	122,392	5.5	35,896	5,063
Michigan	123,237	5.1	23,214	2,263
Wisconsin	78,583	3.9	26,937	1,645
New Jersey	93,446	3.9	25,309	1,502
Iowa	69,098	2.9	23,781	2,121
Total, 10 States	1,196,871	61.3	332,277	74,154
Total, Other States	784,413	38.7	271,139	40,454

Source: Census of Retail Distribution, 1929 and 1933, and  
Census of Wholesale Distribution, 1929 and 1933

a/ Consists of lumber and building material dealers, lumber and hardware dealers, roofing dealers, and other dealers (brick, stone, cement, etc.).

b/ Consists of wholesalers proper of lumber and building materials, exclusive of lumber and millwork dealers and of glass dealers. The 1933 data do not include the sales of wholesalers whose volume was less than \$1,000 that year.

c/ Includes sales of wholesalers of glass.



In Table XIII, below, data are given on the number of establishments and employees, the amount of sales and payrolls in 22 metropolitan districts. It is not possible to tell from these data the volume of commodities shipped across state lines, but the figures do show the amount of sales made in the districts selected, part of which undoubtedly consisted of commodities which crossed state lines.

The data given in this table are subject to the limitations mentioned heretofore; namely, that they are not strictly representative of the Trade as defined by the Code, because data for "lumber and building material dealers" and "lumber and hardware" dealers, only a minor part of whose business was covered by the Code definition, are included.

### Exports

The amount of goods exported by the members of this Trade is negligible, according to the Secretary of the former Code Authority.

### Mark-Up

The Secretary estimated that the average mark-up on warehouse items is 50 per cent of cost; on carload items, 12½ per cent; and that the average mark-up on all items is 40 per cent.

### Advertising Media

The advertising media used by the Trade are: radio, newspapers, trade journals, calendars, pencils and miscellaneous items.

TABLE XIII

Extent of Retail Lumber and Building Materials Business  
in 22 Metropolitan Districts,  
Which Extend Across State Lines, 1929a/

District	Number of Establishments <sup>b/</sup>	Number of Employees <sup>c/</sup>	Payrolls (000's) <sup>c/</sup>	Net Sales	
				Amount (000's)	Per Cent of U. S. Total
U. S. Total	26,377	149,559	\$222,854	\$1,918,284	100.0
Total, 22 Metropolitan Districts	1,896	19,199	35,632	269,609	14.1
Chattanooga	11	175	240	1,637	0.1
Chicago	259	3,308	7,363	48,783	2.5
Cincinnati	65	670	1,118	8,663	0.5
Davenport	20	644	1,000	7,842	0.4
Duluth	30	199	367	2,982	0.3
Evansville	22	223	329	1,630	0.1
Huntington (W. Va.)	9	75	98	575	0.0
Kansas City (Kans. & Mo.)	104	1,053	1,735	11,813	0.6



TABLE XIII (Cont'd)

District	Number of Establishments <sup>b/</sup>	Number of Employees <sup>c/</sup>	Payrolls (000's) <sup>c/</sup>	Net Sales	
				Amount (000's)	Per Cent of U. S. Total
Louisville	41	481	514	4,094	0.2
Memphis	37	494	711	5,056	0.3
New York	650	6,006	12,290	108,134	5.6
Omaha	54	556	912	6,605	0.3
Philadelphia	171	1,475	2,422	17,246	1.0
Portland (Ore.)	61	268	382	2,505	0.1
Providence	85	1,013	1,619	11,260	0.6
St. Louis	135	1,113	1,791	11,535	0.6
Springfield (Mass.)	20	182	330	2,621	0.1
Trenton	18	187	420	3,038	0.2
Washington, D. C.	31	354	581	4,598	0.2
Wheeling	14	105	195	840	0.0
Wilmington	9	246	365	2,691	0.1
Youngstown	50	472	849	5,460	0.3

Source: Bureau of the Census, Metropolitan Districts; Retail Distribution, State Reports, 1929.

- <sup>a/</sup> The Metropolitan Districts selected are those which extend across state lines. The data for these districts were compiled from Census data reported for the larger cities within each District. As data for the smaller cities are not available, the figures shown here are not complete, but can be accepted as a minimum for each respective District.
- <sup>b/</sup> Consists of lumber and building material dealers, lumber and hardware dealers, roofing dealers, and others (brick, stone, cement, etc.).
- <sup>c/</sup> Includes salaried persons and wage earners; part-time and full-time employees.





## Chapter V

### TRADE PRACTICES

#### Unfair Practices Prior to the Code

Statements of the Secretary of the former Code Authority indicate that the chief unfair trade practices prevalent in the Trade prior to approval of the Code were sales by manufacturers to contractors without adequate mark-up, and selling below cost.

An explanation of the nature of the unfair trade practices existing in this Trade prior to the adoption of the Code has also been supplied by John B. Rose, Chairman of the former Code Authority, whose statement is reproduced herewith:

"...The practices prohibited by the Code include: the acceptance or offering of secret allowances, rebates and unearned discounts; defamation of competitor; attempts to induce breach of contracts between competitors and customers and interference with the performance of contractual duties for the purpose of injuring and embarrassing competitors; inducing salesmen and credit men of the competitor to leave the employment of such competitor in order to obtain information and otherwise injure the competitor's business; offering or agreeing to furnish the requirements of a project at a lump sum price; and misrepresentation of quality and quantity of merchandise to contractors and consumers.

"Perhaps the greatest injury to the Trade prior to the inception of the Code was that received due to the use of certain of its members of sales below cost. The Builders' Supplies Trade, regulating distributors of supplies for construction, is a Trade which is subject to terrific price competition since there is practically no competition as to the style or quality of products distributed.

"Cements, limes, plasters, brick, etc., are all of almost identical quality and the competitive pressure which style affords to some retail products is not present in this Trade. Consequently, price becomes a very vital factor and prior to the Code's inception, and in many instances since that date, prices have fallen to such a low level that it is impossible for a Member of the Trade to maintain decent wage and hour schedules and meet the price competition to which such Member is subjected.

"Since the greatest item by far in the overhead cost of doing business as a Member of the Trade is that of labor, it is evident that demoralized prices immediately have the effect of lowering wage rates and increasing the hours of labor."

#### Unfair Trade Practices Under the Code

According to the Deputy formerly in charge of administration of the Code, the chief unfair practices under the Code were failure to file prices, and selling at other than filed prices.

#### Effect of Price Cutting on National Price Structure

Prices of individual members of the Industry or of a given area have little effect on national price structure because of high shipping costs.



## APPENDIX

Building material prices in twenty cities of the United States fell one and one-half per cent from December 15, 1934, to March 15, 1935, according to reports covering retail prices of twenty-two principal building materials reported to the Division of Research and Planning. Substantial increases were reported for window glass, asphalt shingles and pine boards, while fir dimension lumber, gypsum board and building paper showed substantial declines. Common brick increased one-half of one per cent, and cement three-tenths of one per cent, or approximately two cents a barrel. Gypsum plaster showed no change from December 15, while gypsum board showed a decline of more than two and one-half per cent. White lead also showed a decline of two and three-fourths per cent.

The materials represent the composite prices from twenty cities reported to the NRA in cooperation with the respective Code Authorities. Each item represents a composite price in the twenty cities, with the cities weighted in accordance with square foot construction in 1929 and 1934. All items are then assembled to produce a weighted average index, with each item weighted in proportion to its relative importance to building construction. All materials represent the delivered price paid by Contractors to Retail Lumber and Builders' Supplies Dealers for less than carload lots.



BUILDING MATERIALS PRICE CHARTS

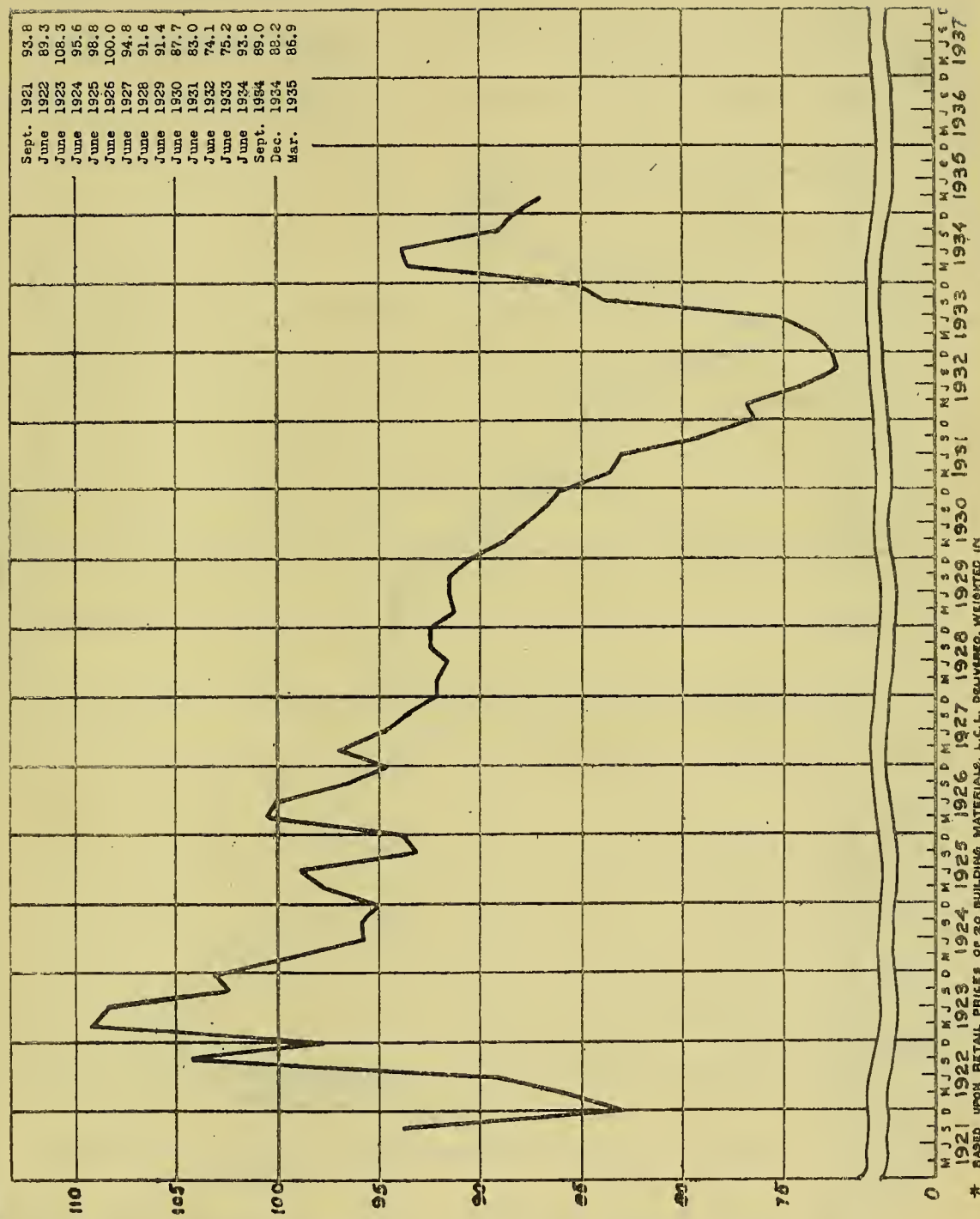
Index of Building Materials Prices .....	Chart No. 1
Common Brick .....	Chart No. 2
Crushed Stone .....	Chart No. 3
Building Sand .....	Chart No. 4
Portland Cement .....	Chart No. 5
Hollow Tile .....	Chart No. 6
Gypsum Plaster .....	Chart No. 7
Gypsum Board .....	Chart No. 8
Lime (Hydrated) .....	Chart No. 9
*White Lead (in oil) .....	Chart No. 10
*Rosin Sized Sheeting (Building Paper) .....	Chart No. 11
*Asphalt Shingles .....	Chart No. 12
Roofing Slate .....	Chart No. 13
*Window Glass .....	Chart No. 14
*Steel Pipe .....	Chart No. 15
*Cast Iron Soil Pipe .....	Chart No. 16
*Structural Steel .....	Chart No. 17
*Reinforcing Steel Bars .....	Chart No. 18
*Wire Nails .....	Chart No. 19
*Douglas Fir (#1 common) .....	Chart No. 20
*Yellow Pine (#2 common) .....	Chart No. 21
*Plumbing Fixtures .....	Chart No. 22

\*Not included in code definition of Builders' Supplies Trade



# CHART I INDEX OF RETAIL BUILDING MATERIALS PRICES-SEPT. 1921-MAR. 1935\*

INDEX  
NUMBERS  
1925=100



\* BASED UPON RETAIL PRICES OF 20 BUILDING MATERIALS, L.C.I. DELIVERED, WEIGHTED IN ACCORDANCE WITH THEIR RELATIVE IMPORTANCE.

N.R.A.  
RESEARCH & PLANNING

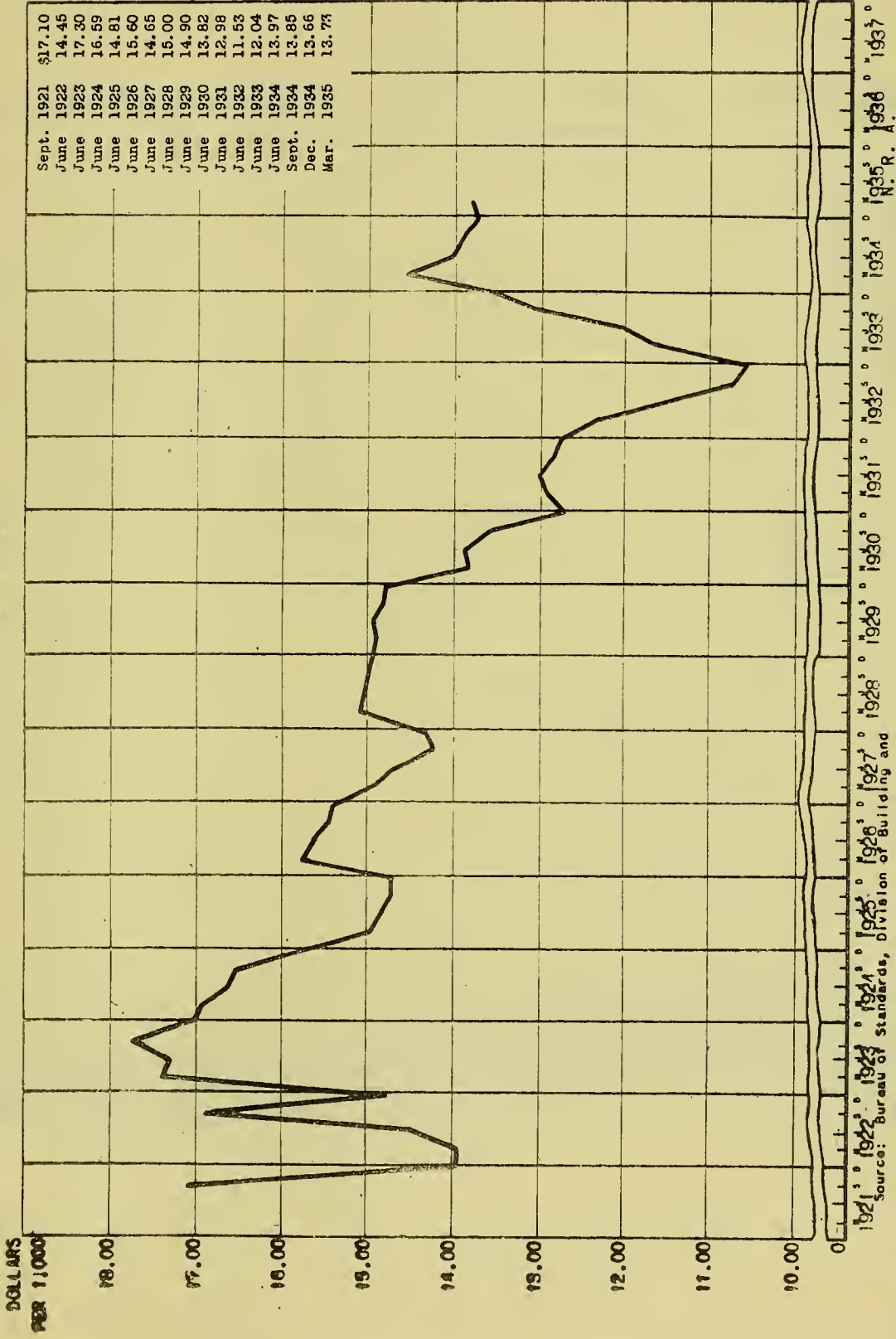




# CHART II

## COMMON BRICK RETAIL PRICES - SEPT. 1921 TO MAR. 1935

### L.C.L. DELIVERED



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Housing "Building Materials Prices" Sept. 1921 to June 1933.

Code Authority for the Builders Supplies Trade

Sept. 1933 to Dec. 1934.

Reports to M.R.A. from Builders Supplies Retailers

Mar. 1935.

THE UNIVERSITY OF CHICAGO

DEPARTMENT OF CHEMISTRY

RESEARCH REPORT

NO. 1234

BY

JOHN D. JONES

AND

JOHN D. JONES

AND

JOHN D. JONES

AND

JOHN D. JONES

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JOHN D. JONES

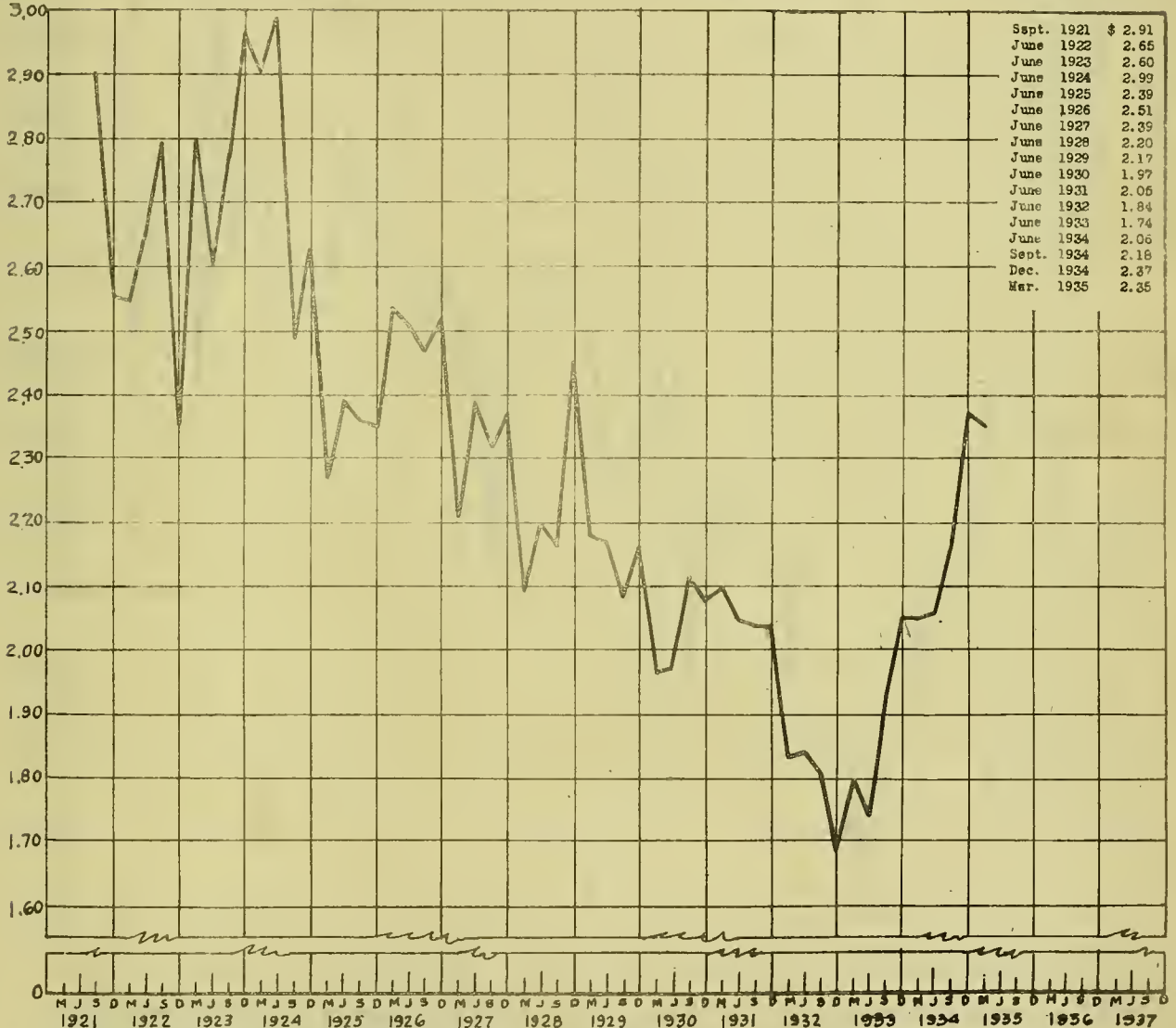
AND

JOHN D. JONES

# CHART III

## CRUSHED STONE RETAIL PRICES SEPT. 1921-MAR. 1935 3/4 INCHES, L.C.L. DELIVERED

DOLLARS  
PER CUBIC YARD



SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING,  
"BUILDING MATERIALS AND PRICES", SEPTEMBER 1921 - JUNE 1935  
CODE AUTHORITY FOR THE BUILDERS' SUPPLIES TRADE, SEPT. 1935-DEC. 1934  
REPORTS TO N.R.A. FROM BUILDERS' SUPPLIES RETAILERS, MARCH 1935

NRA  
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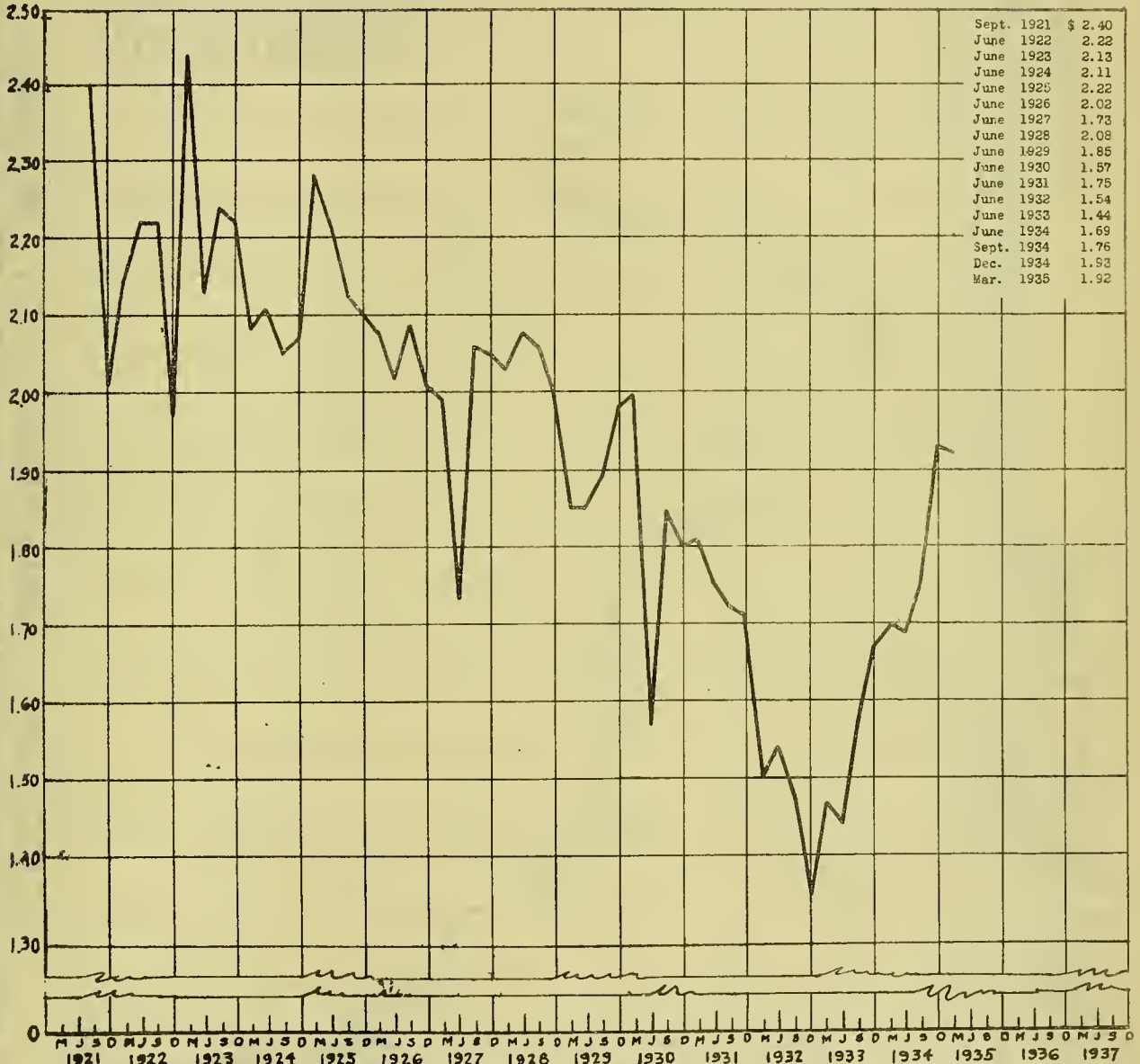


# CHART IV

## BUILDING SAND RETAIL PRICES-SEPT. 1921-MAR. 1935.

### L.C.L. DELIVERED

DOLLARS  
PER CUBIC YD.



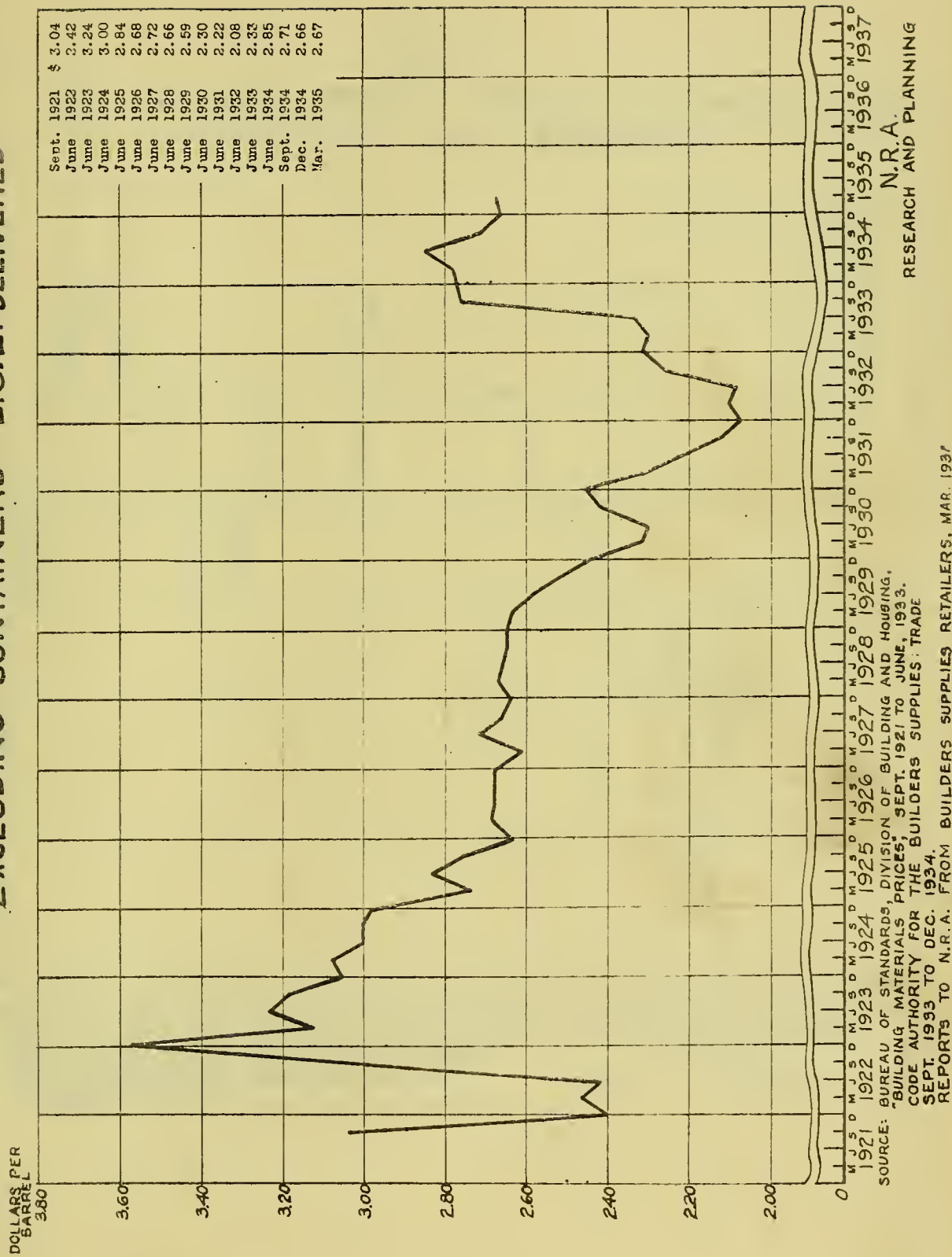
SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING;  
BUILDING MATERIAL PRICES, SEPT. 1921 TO JUNE 1933.  
CODE AUTHORITY FOR THE BUILDERS SUPPLIES TRADE SEPT. 1933 TO DEC. 1934.  
REPORTS TO N. R. A. FROM BUILDERS SUPPLIES RETAILERS, MAR. 1935

NRA  
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# PORTLAND CEMENT RETAIL PRICES, SEPT. 1921-MAR. 1935 EXCLUDING CONTAINERS L.C.L. DELIVERED

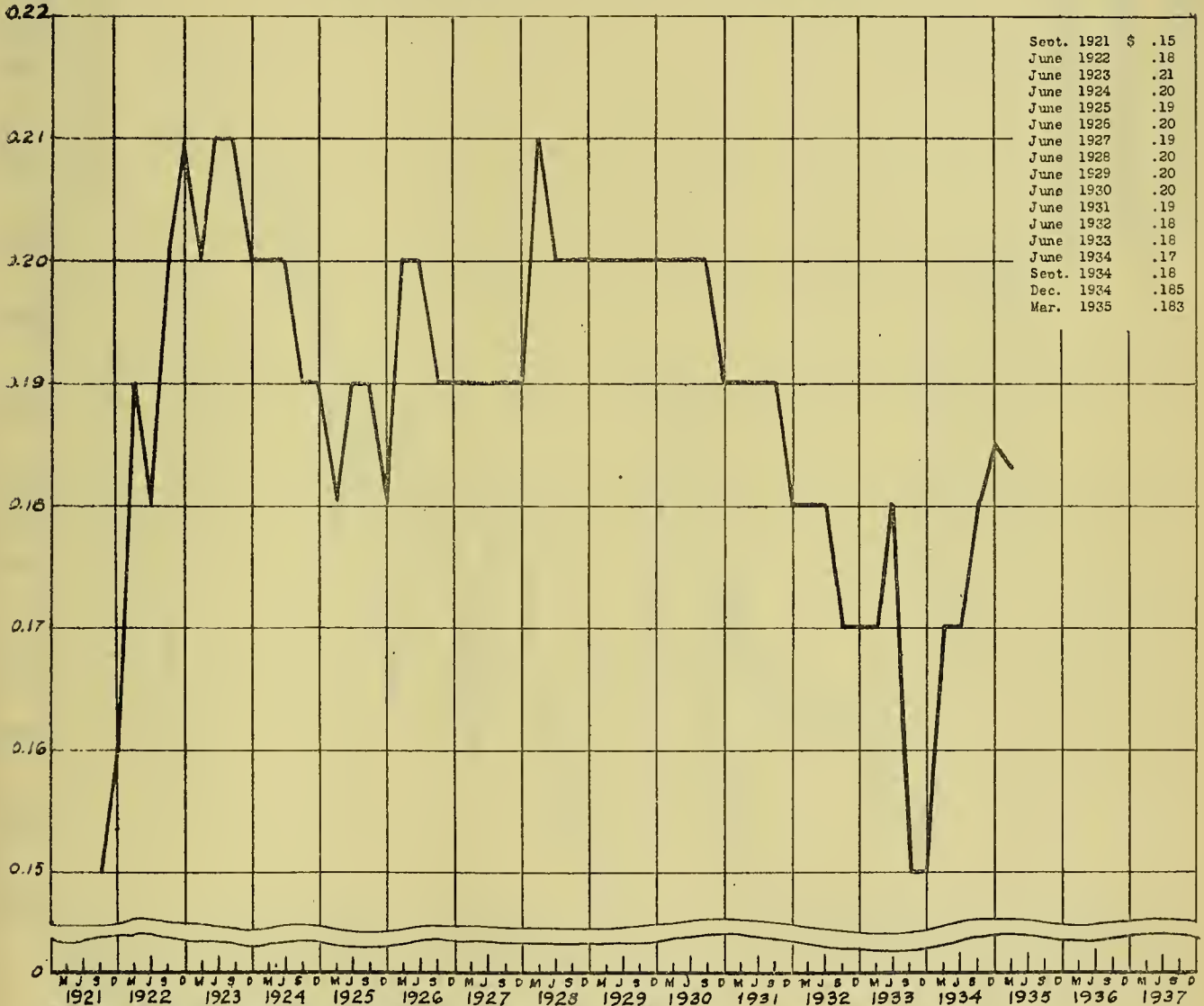




# CHART VI

## HOLLOW TILE RETAIL PRICES-SEPT. 1921-MAR. 1935. 8" X 12" X 12", L. C. L. DELIVERED

DOLLARS  
PER TILE



SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING,  
"BUILDING MATERIALS PRICES," SEPT. 1921 TO JUNE 1933  
CODE AUTHORITY FOR THE BUILDER'S SUPPLIES TRADE,  
SEPT. 1933 TO DEC. 1934  
REPORTS TO N.R.A. FROM BUILDERS SUPPLIES RETAILERS, MAR. 1935

N.R.A.  
RESEARCH AND PLANNING DIVISION



# CHART VII

## GYPSUM PLASTER RETAIL PRICES-SEPT. 1921 TO MAR. 1935 GROUND, L.C.L. DELIVERED



Source: Bureau of Standards, Division of Building and  
Housing "Building Materials Prices", Sept. 1921  
to June 1933.  
Code Authority for the Builders' Supplies Trade,  
Sept. 1923 to Dec. 1924.  
Reports to N.R.A. from Builders' Supplies Retailers,  
Mar. 1935.

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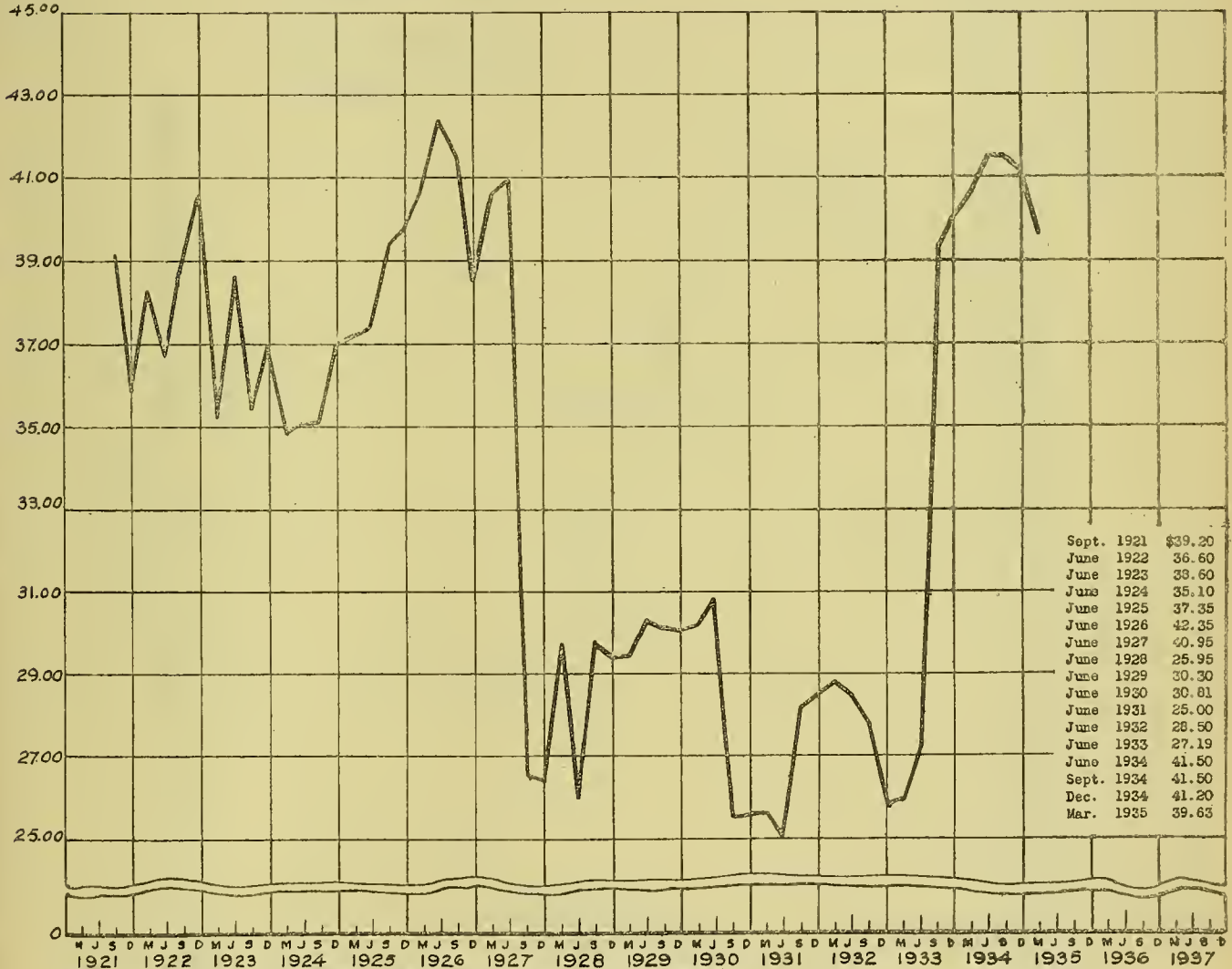




# CHART VII

## GYPSUM BOARD RETAIL PRICES - SEPT. 1921 - MAR. 1935 3/8 INCHES, L.C.L. DELIVERED

DOLLARS



SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING,  
"BUILDING MATERIALS PRICES" SEPT. 1921 TO JUNE 1933.  
CODE AUTHORITY FOR RETAIL LUMBER AND BUILDING MATERIALS  
PRODUCTS INDUSTRY SEPT. 1933 TO DEC. 1934.  
REPORTS TO NRA FROM BUILDING MATERIALS RETAILERS MAR. 1935.

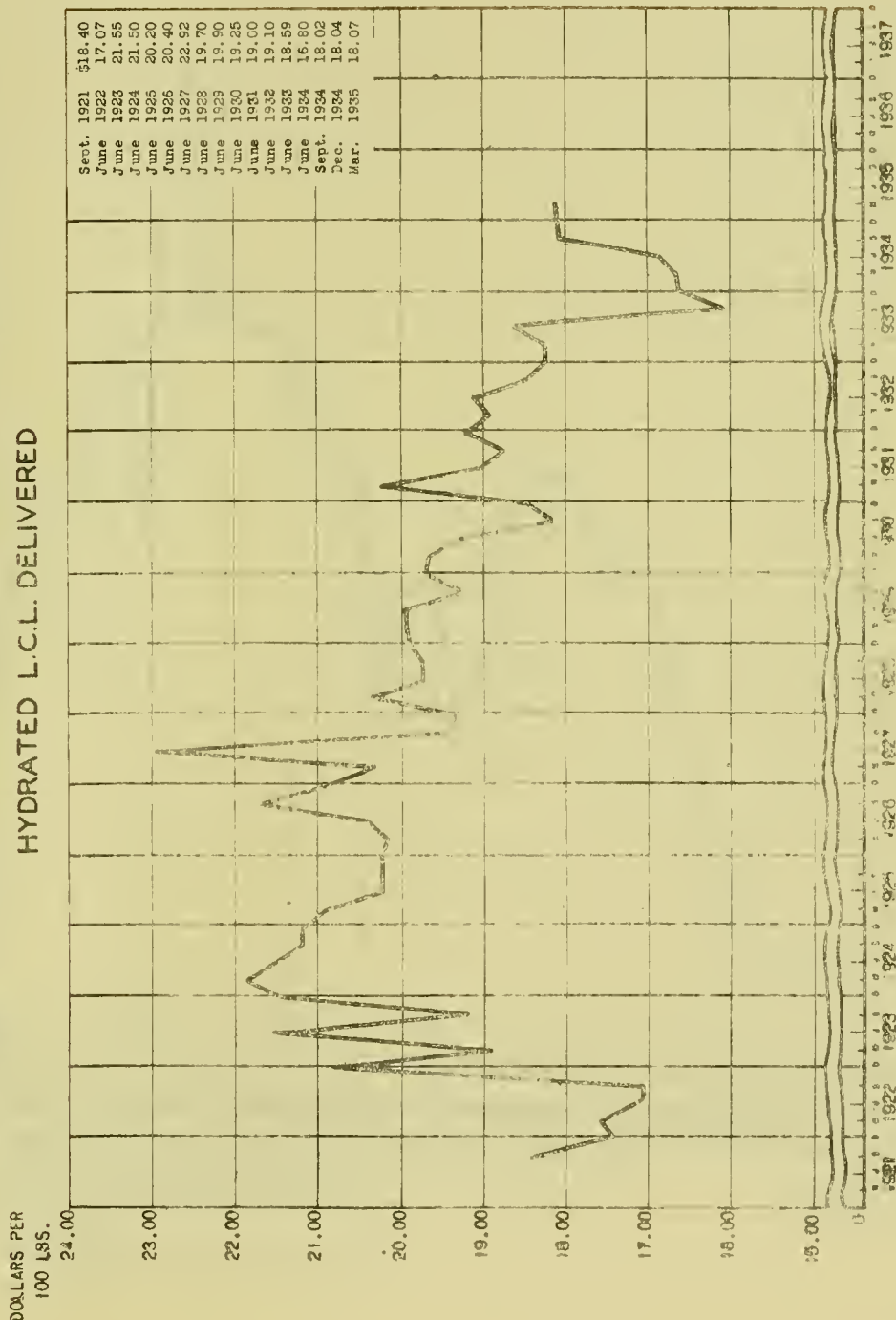
N.R.A.  
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# CHART IX

## LIME RETAIL PRICES--SEPT. 1921 TO MAR. 1935



H. R. A.  
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Source: Bureau of Standards, Division of Building and Housing, "Building Materials Prices" Sept. 1935.

to June 1935.

Cost Authority for the Building Supplies Trade

Sept. 1933 to Dec. 1934.

Report to H. R. A. from Building Supplies Manufacturers

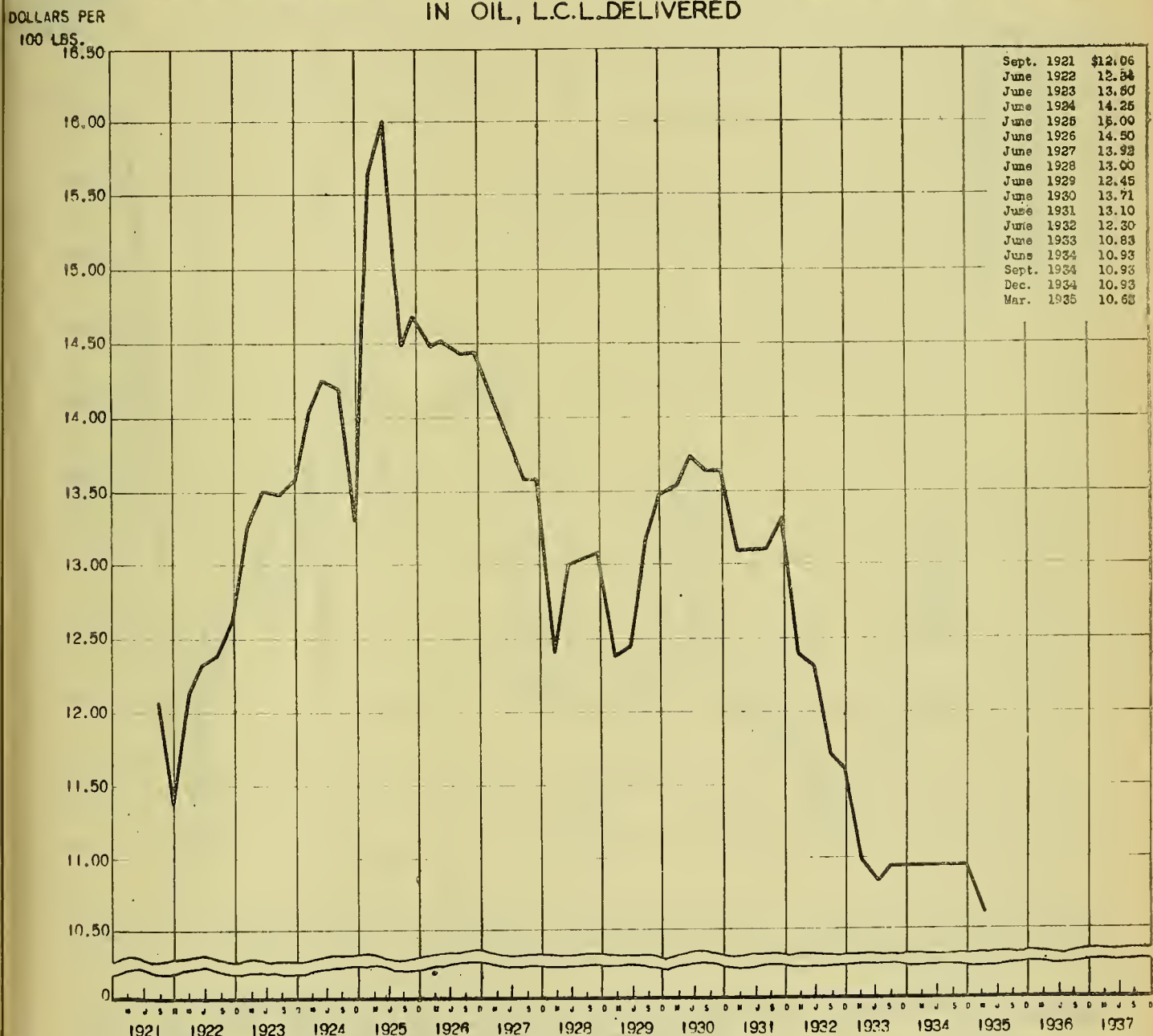
March 1935.



# CHART X

## WHITE LEAD RETAIL PRICES - SEPT. 1921 TO MAR. 1935

### IN OIL, L.C.L. DELIVERED



Source: Bureau of Standards, Division of Building and Housing, "Building Materials Prices", Sept. 1921 to June 1933.  
Code Authority of the Lead Industry, Sept. 1933 to Mar. 1935.

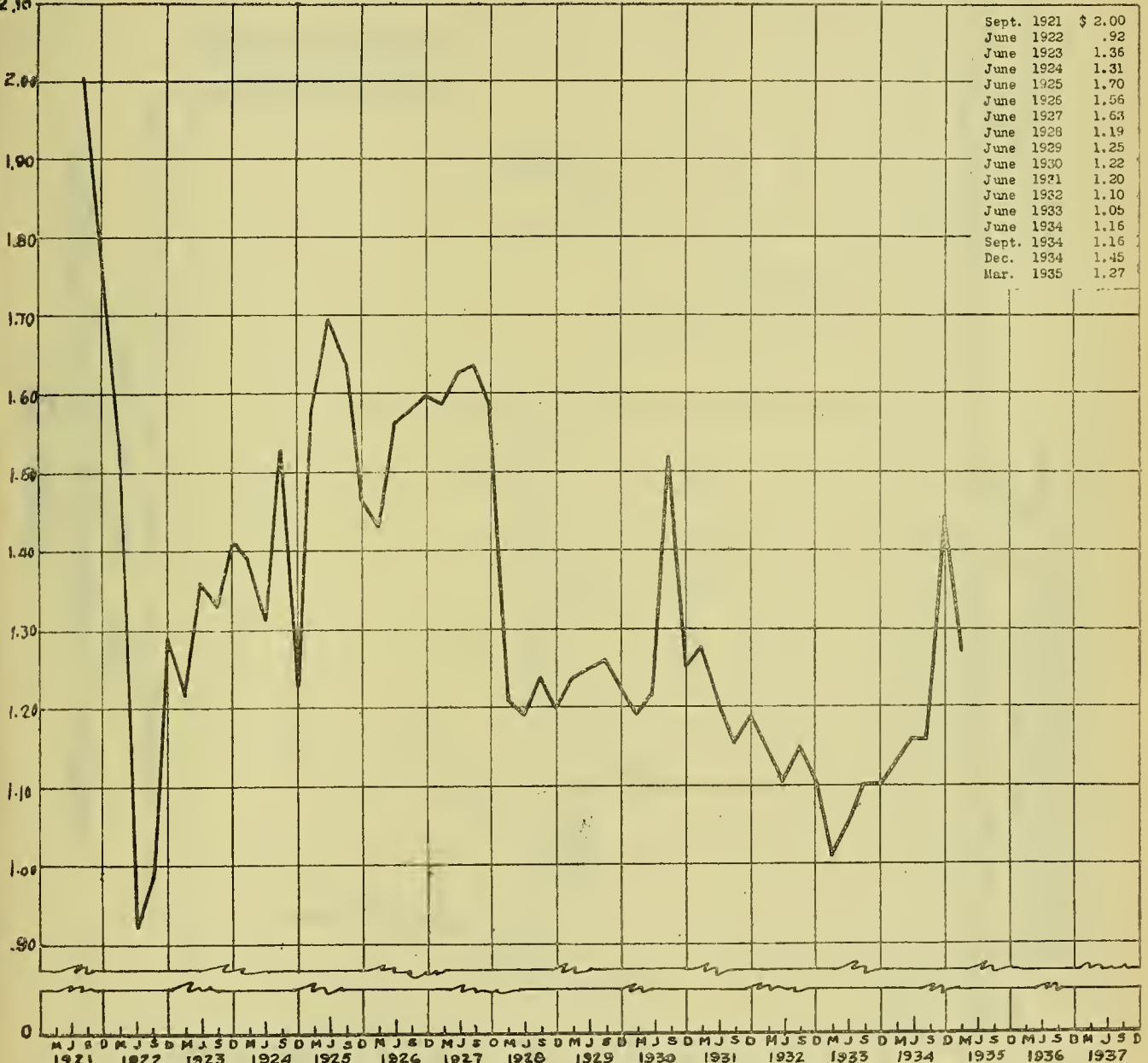
N. R. A.  
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# CHART XI

## ROSIN SIZED SHEETING RETAIL PRICES-SEPT. 1921-MAR. 1935 3 PLY 50 POUNDS PER ROLL, L.C.L. DELIVERED

DOLLARS  
PER 500 SQ. FT.  
2.10



SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING, "BUILDING MATERIALS PRICES, SEPT. 1921 TO JUNE 1933"  
CODE AUTHORITY FOR RETAIL LUMBER AND BUILDING MATERIALS PRODUCTS  
INDUSTRY, SEPT. 1933 TO DEC. 1934  
REPORTS TO N.R.A. FROM BUILDING MATERIALS RETAILERS, MAR. 1935.

N.R.A.  
RESEARCH AND PLANNING



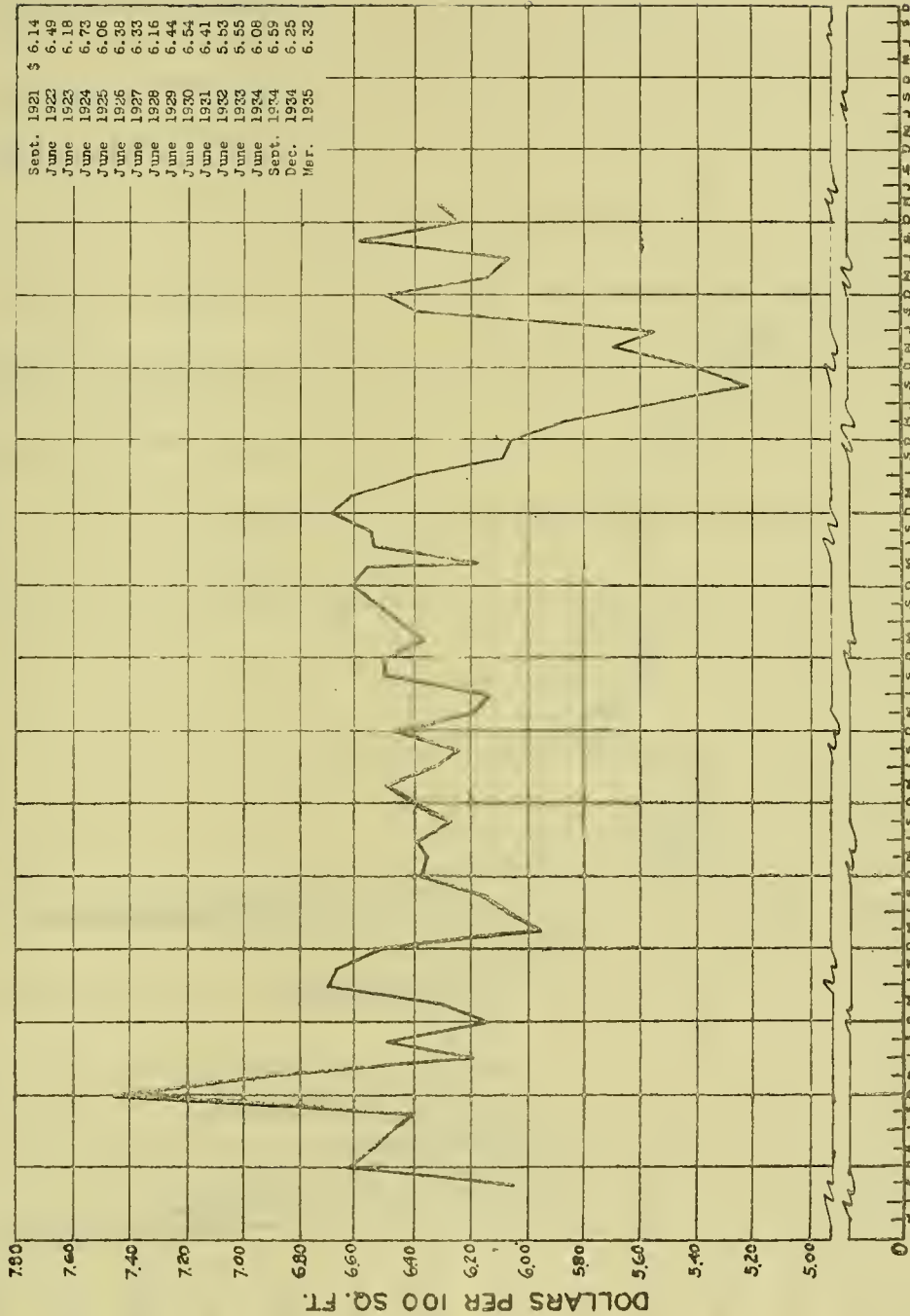


# CHART XII

## ASPHALT SHINGLES RETAIL PRICES

### SEPT. 1921 - MAR. 1935

10X36 STANDARD, 4 IN.1, GREEN, 195 POUNDS, L.C.L. DELIVERED



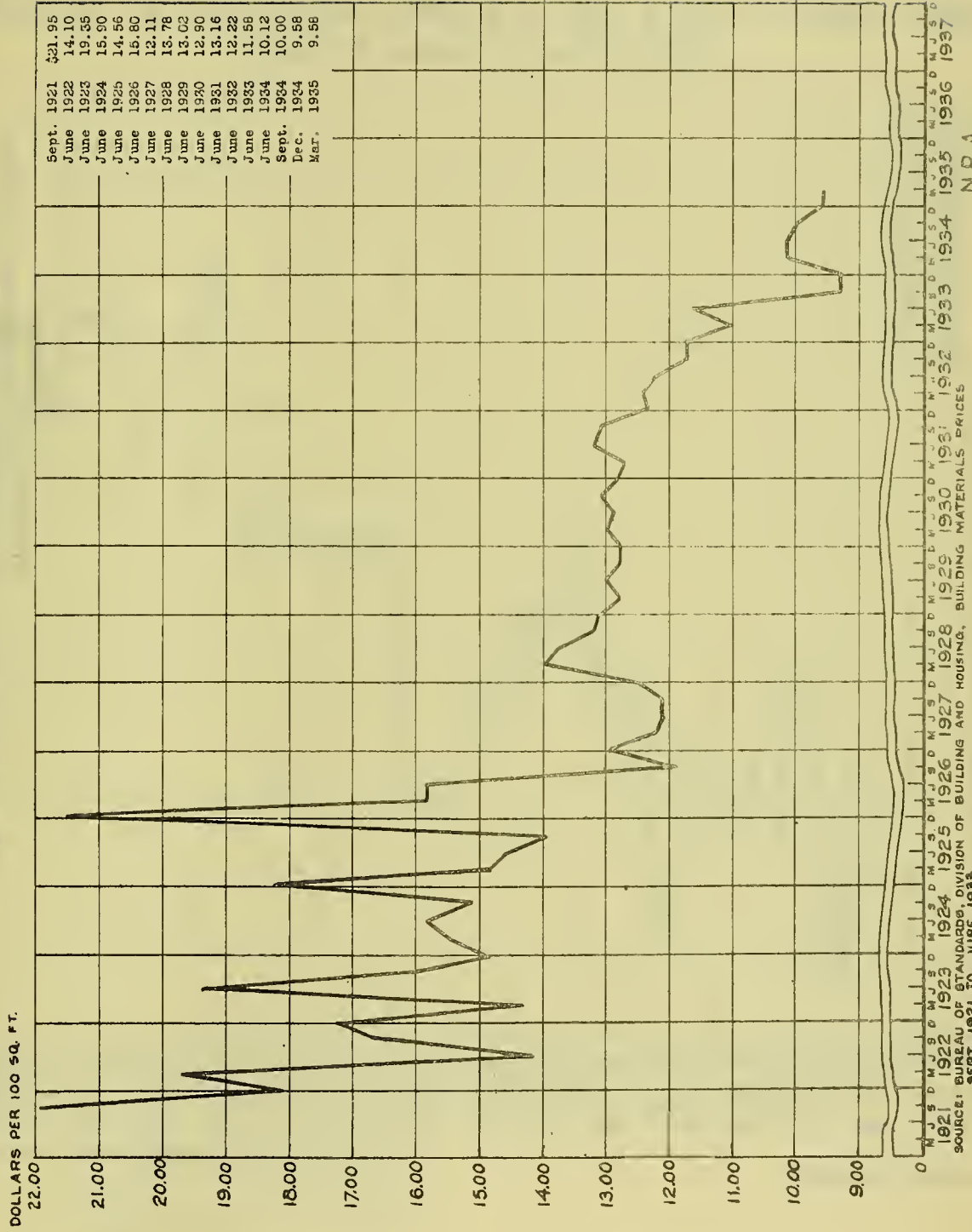
NRA  
RESEARCH AND PLANNING

SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING  
"BUILDING MATERIALS PRICES," SEPT. 1921 TO JUNE 1933.  
CODE AUTHORITY FOR RETAIL LUMBER AND BUILDING MATERIALS  
PRODUCTS INDUSTRY, SEPT. 1933 TO DEC. 1934.  
REPORTS TO NRA FROM BUILDING MATERIALS RETAILERS, MAR. 1935



# CHART XIII

## ROOFING SLATE RETAIL PRICES - SEPT. 1921 - MAR. 1935 #1 RIBBON, L.C.L. DELIVERED



N.R.A.  
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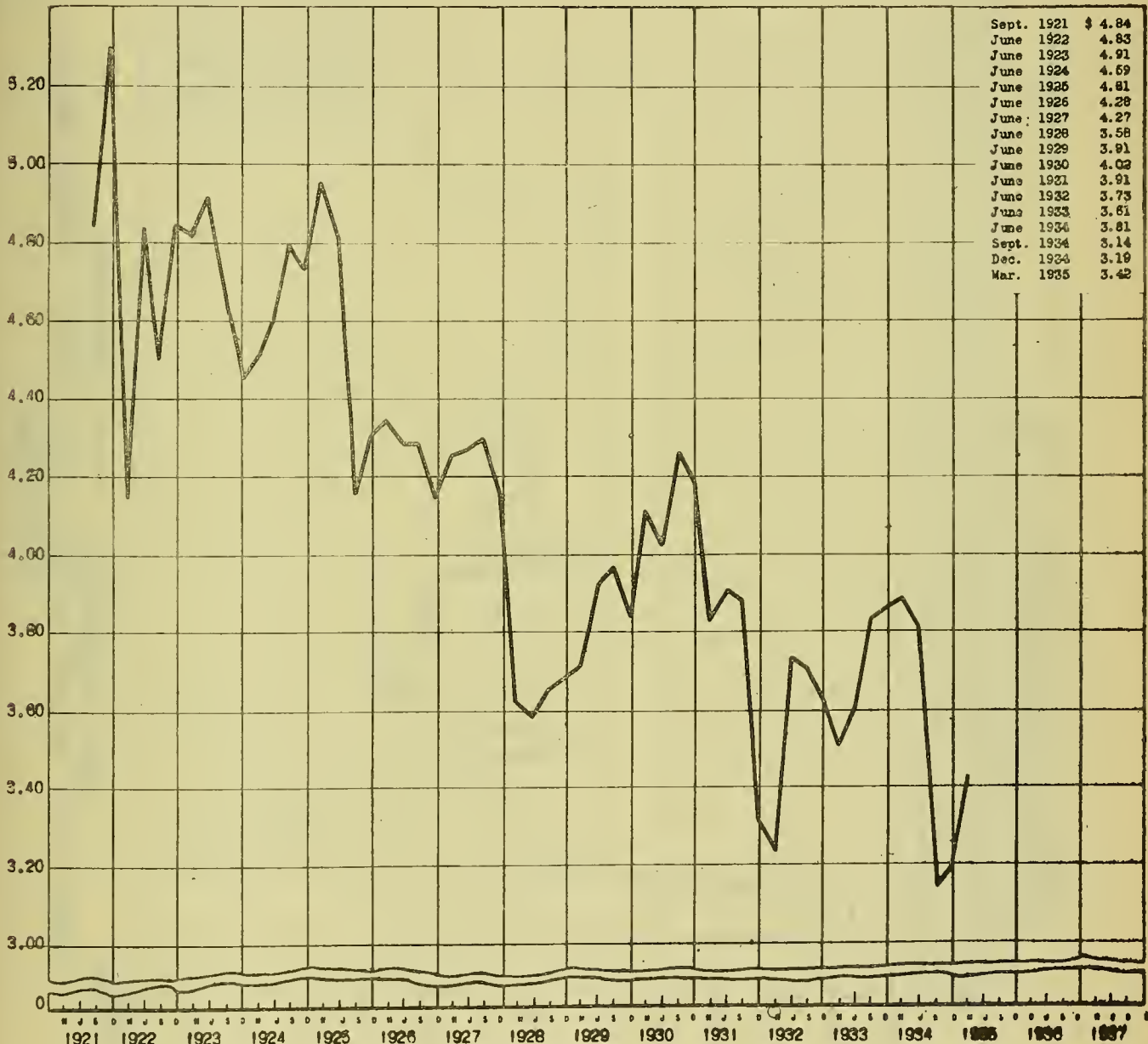


# CHART XIV

## WINDOW GLASS RETAIL PRICES - SEPT. 1921 TO MAR. 1935 SINGLE A 10X12 L.C.L. DELIVERED

DOLLARS

PER SQ. FT.



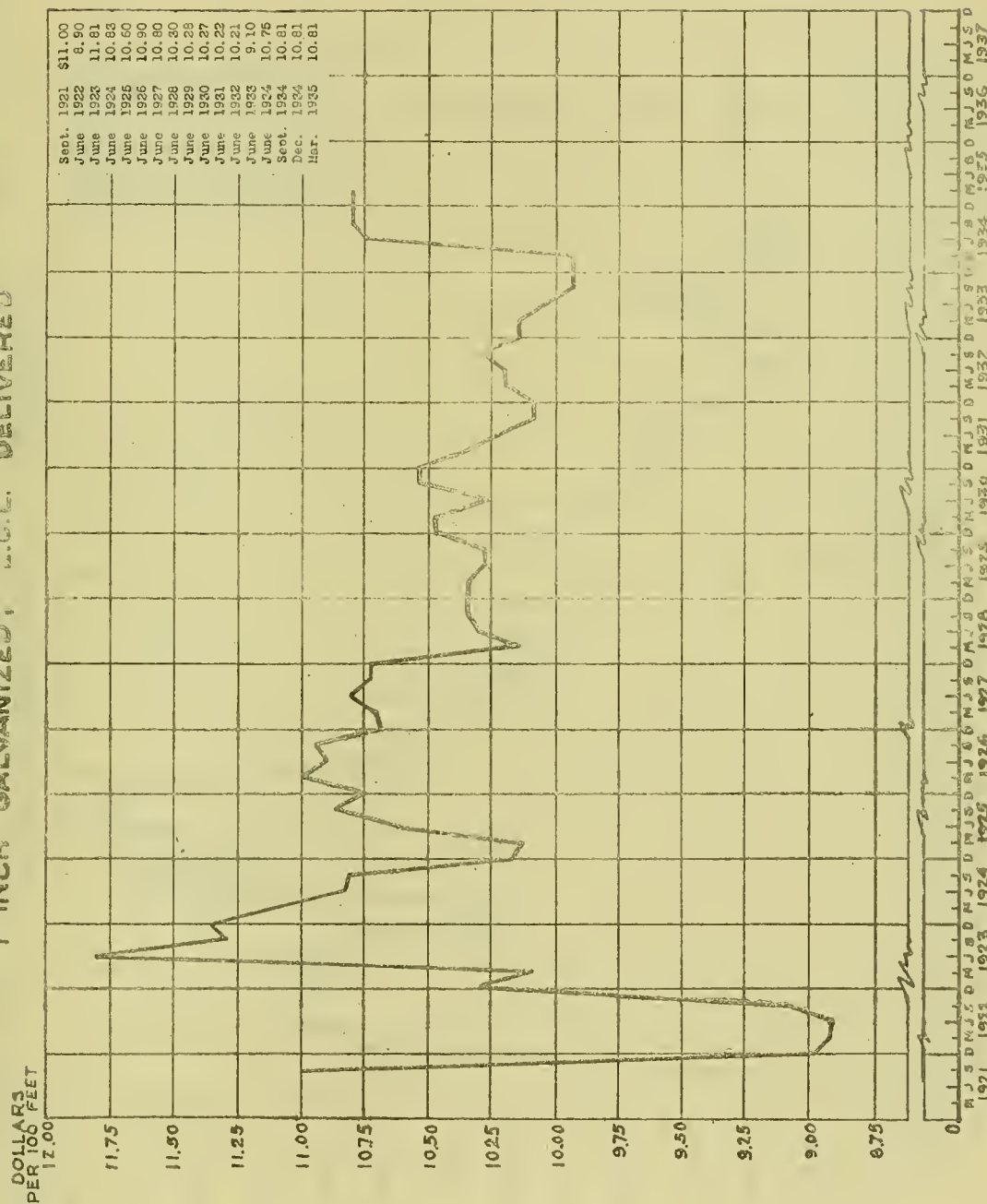
Source: Bureau of Standards, Division of Building and Housing, "Building Materials Prices", Sept. 1921 to June 1933.  
Reports to N.R.A. from Retailers, Sept. 1933 to March 1935.

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STEEL PIPE RETAIL PRICES - SEPT. 1921 - MAR. 1933.  
1 INCH GALVANIZED, L.C.L. DELIVERED



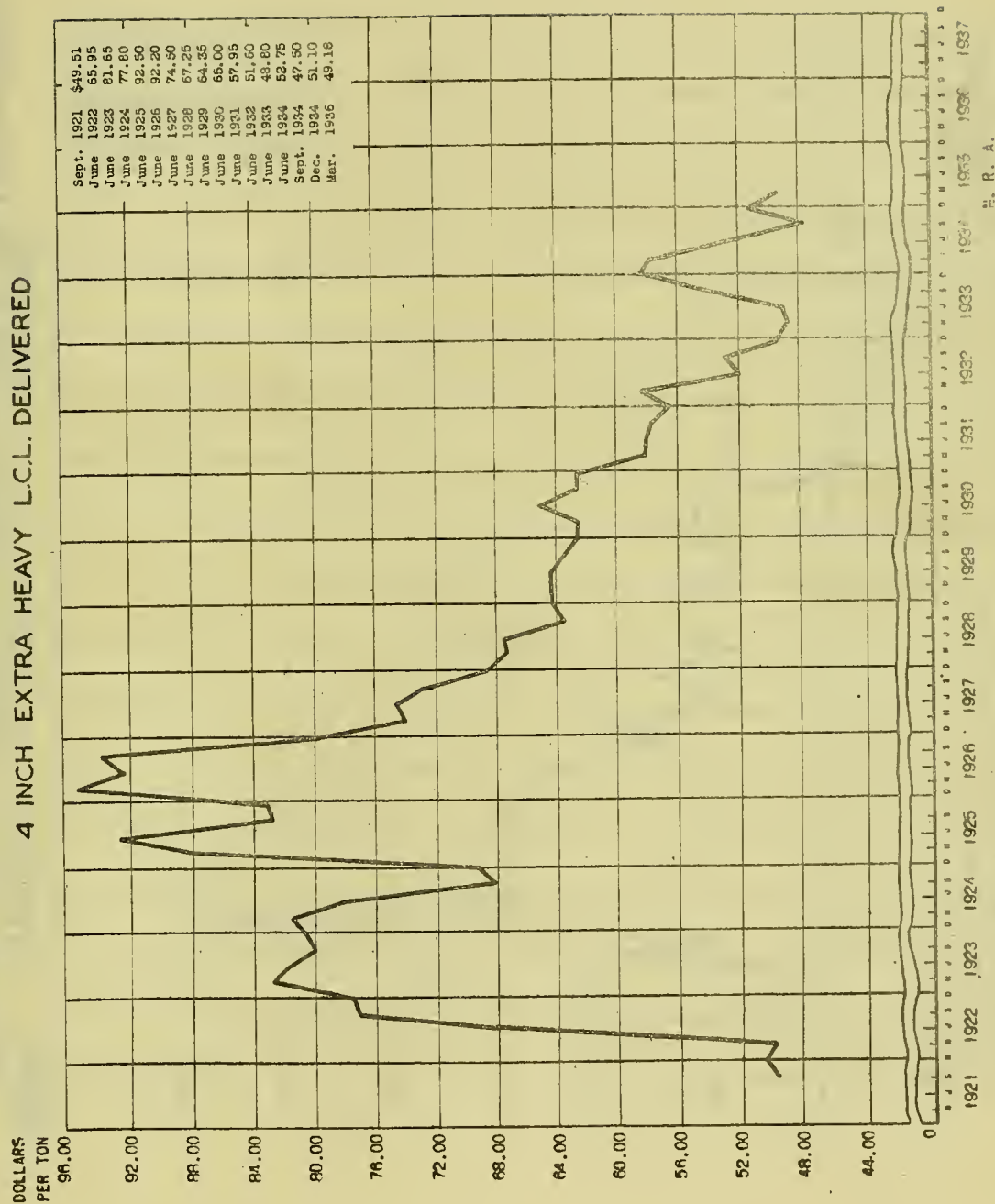
SOURCE: BUREAU OF STANDARDS, DIVISION OF BUILDING AND HOUSING, "BUILDING MATERIALS PRICES" SEPT. 1921 TO JUNE 1933.  
CODE AUTHORITY FOR THE BUILDERS SUPPLY TRADE-SEPT. 1933-DEC. 1934  
REPORTS TO R.N.A. FROM PLUMBING SUPPLY DEALERS, MAR. 1935.

NRA  
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# CHART XVI CAST IRON SOIL PIPE RETAIL PRICES-SEPT. 1921 TO MAR. 1935 4 INCH EXTRA HEAVY L.C.L. DELIVERED



Source: Bureau of Standards, Division of Builders and  
 Housing, "Building Materials Prices" Sept. 1921  
 to June 1933.  
 Reports to H. R. A. from P. G. O., Sept 1935 to  
 March 1935.

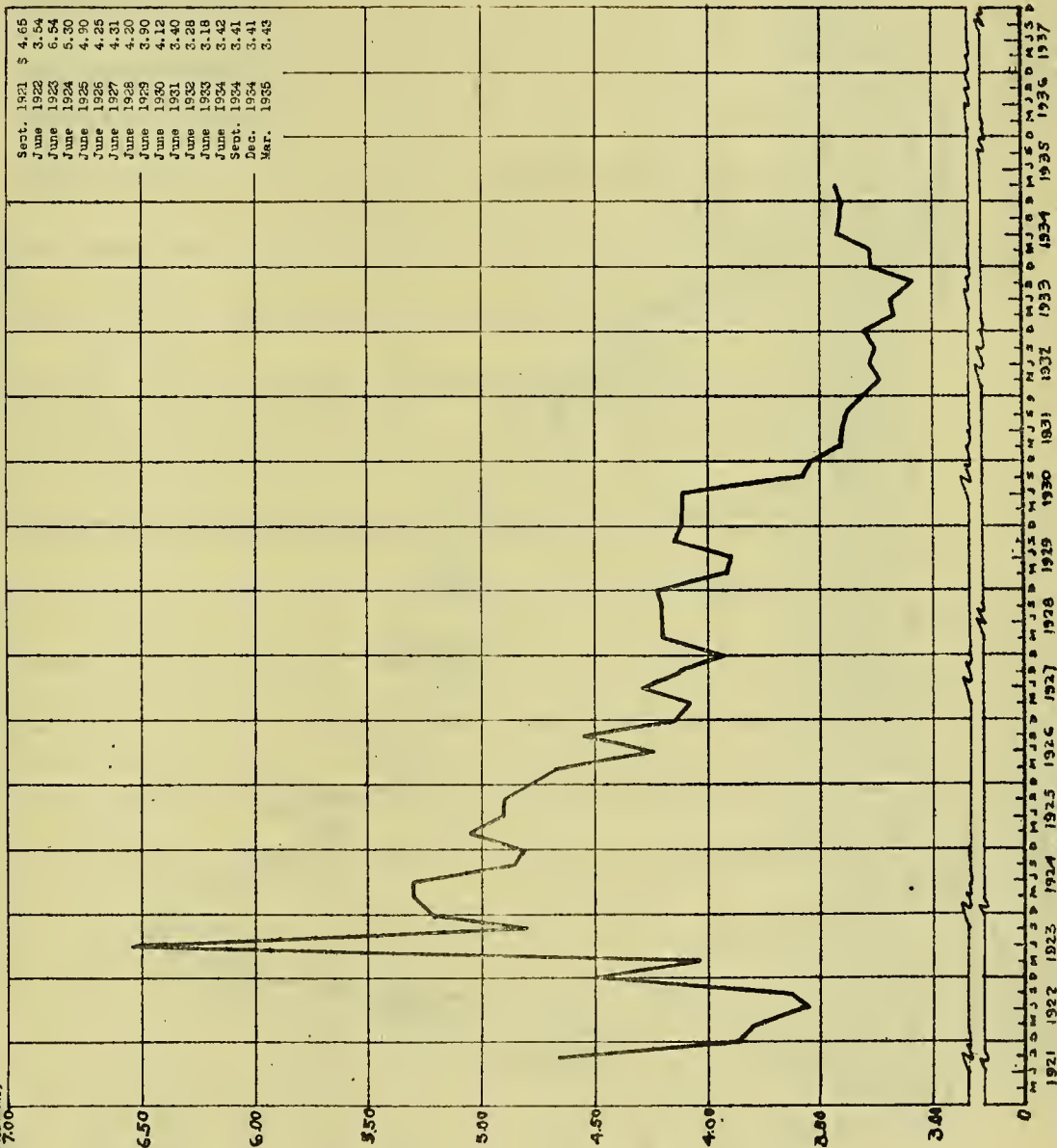
H. R. A.  
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# CHART XVII

## STRUCTURAL STEEL RETAIL PRICES SEPT. 1921-MAR. 1935 FABRICATED 6" IBEAM, L.C.L. DELIVERED

DOLLARS  
PER CWT.

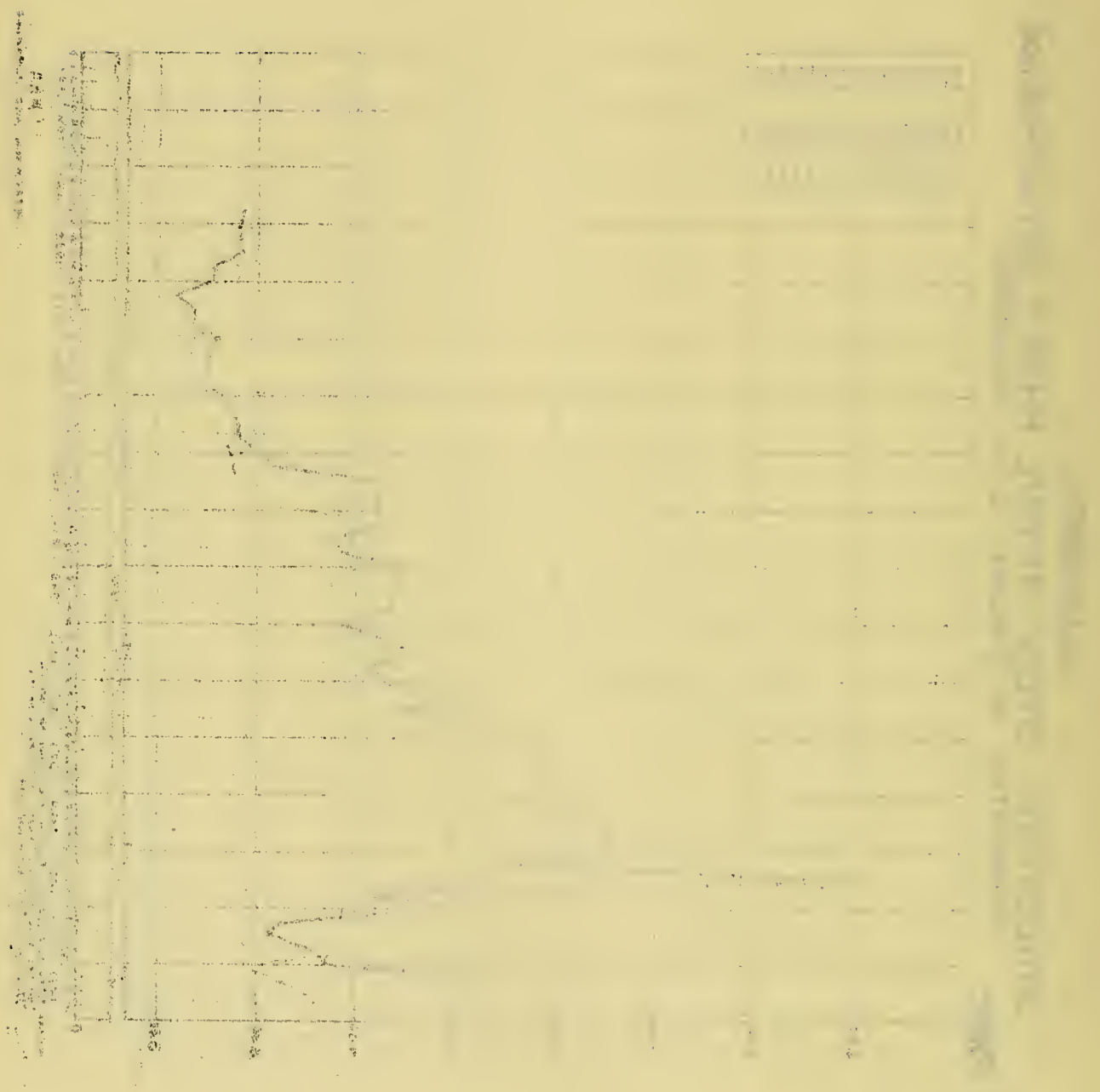


SOURCE: 1921-1923, BUREAU OF MINES, "IRON AND STEEL"; 1924-1935, BUREAU OF MINES, "IRON AND STEEL"; 1936-1937, BUREAU OF MINES, "IRON AND STEEL".

IRON AGE, SEPT. 1929 - MAR. 1935

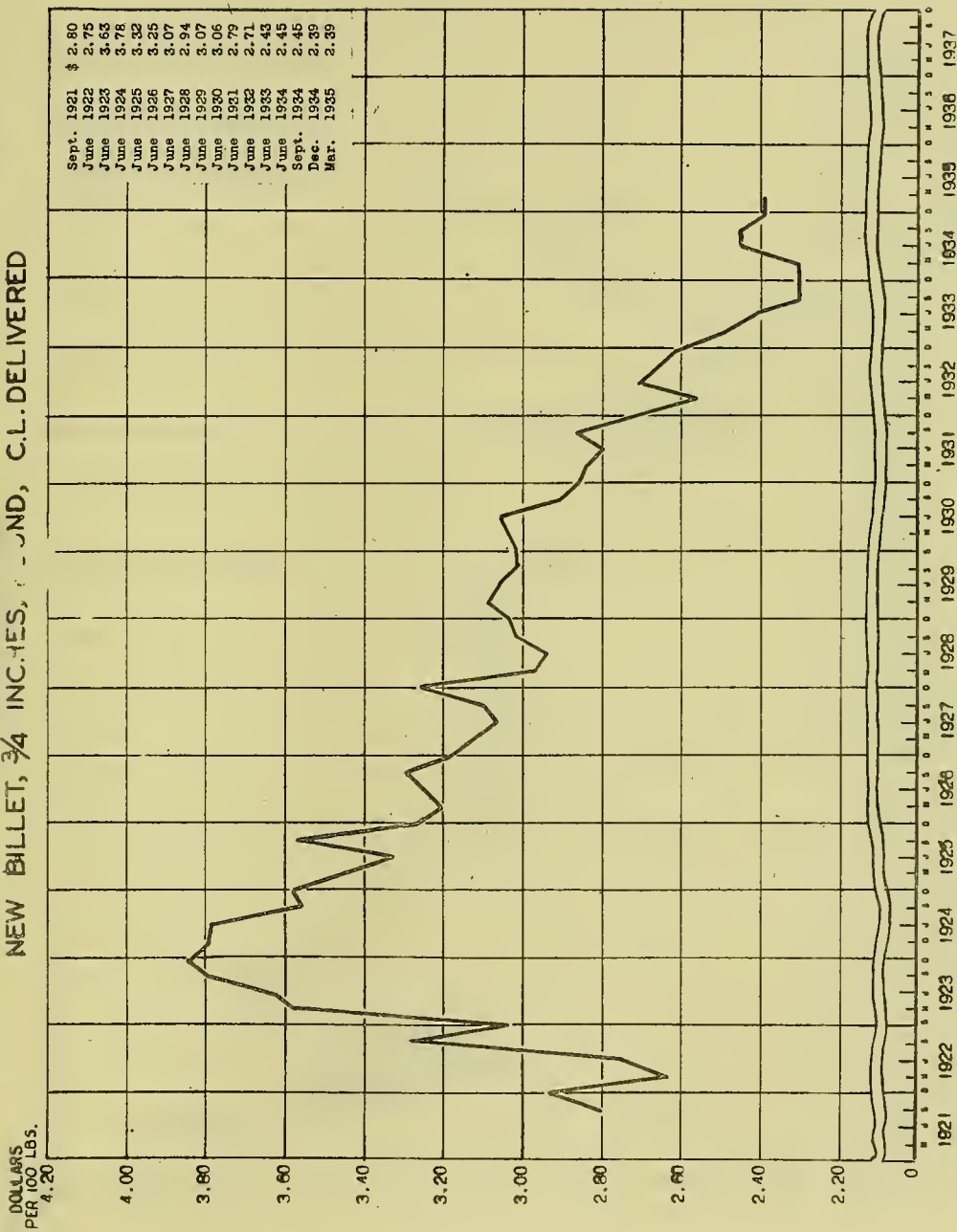
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RESEARCH AND PLANNING



# CHART XVIII

## REINFORCING STEEL BARS WHOLESALE PRICES-SEPT. 1921 TO MAR. 1935 NEW BILLET, 3/4 INCHES, ROUNDED, C.I.DELIVERED



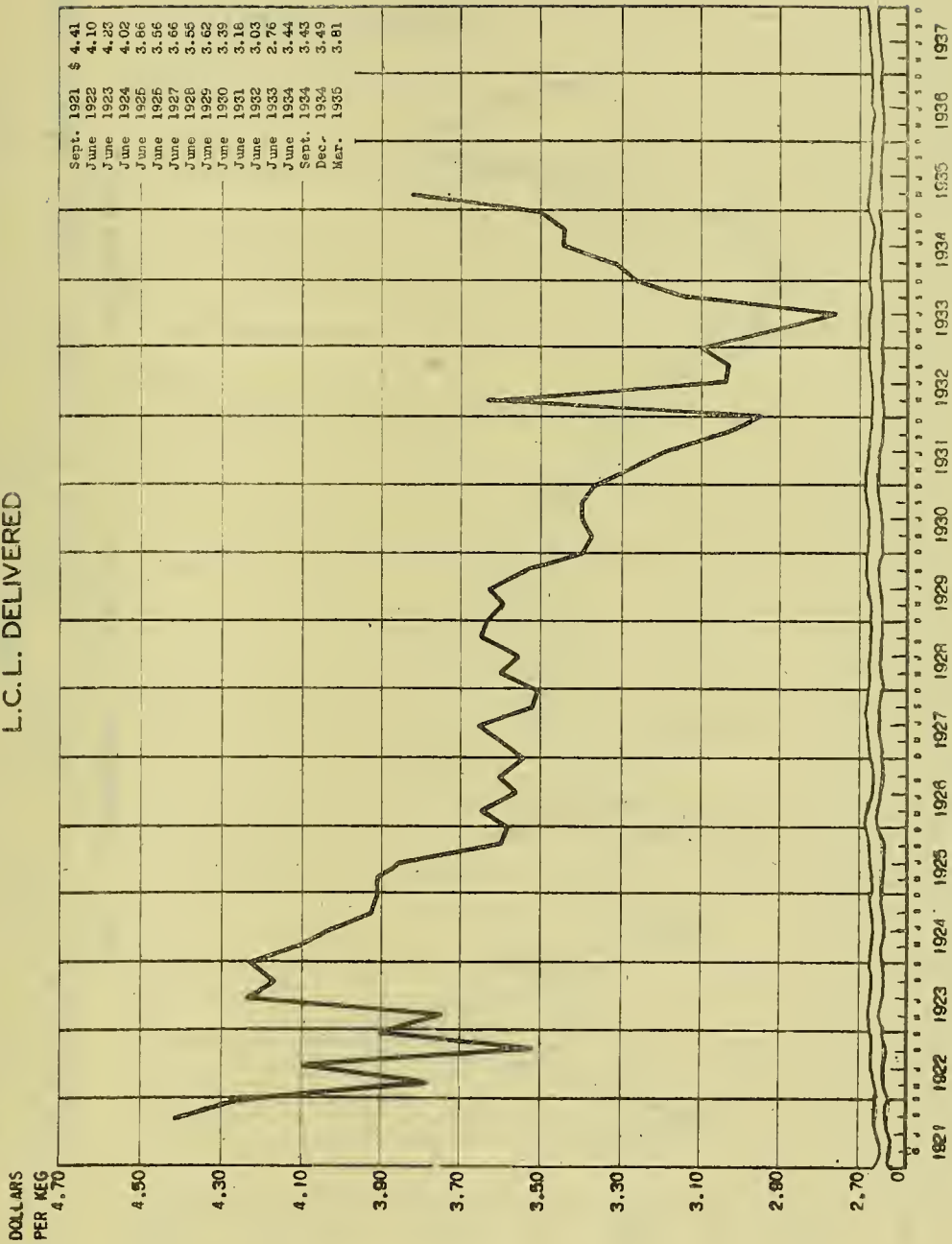
N.R.A.  
RESEARCH AND PLANNING

Source: Bureau of Standards, Division of Building and Housing, "Building Materials Prices" Sept. 1921 to June 1933.  
Code Authority for the Reinforcing Materials Fabricating Industry, Sept. 1933 to Mar. 1935.





# CHART XIX WIRE NAILS RETAIL PRICES - SEPT. 1921 TO MAR. 1935 L.C.L. DELIVERED



N. R. A.  
RESEARCH AND PLANNING

Source: Bureau of Standards, Division of Building and Housing, "Building Materials Prices" Sept. 1921 to June 1933.  
Coda Authority for Retail Lumber and Building Materials Products Industry, Sept. 1933 to Dec. 1934.  
Reports to N.R.A. from Building Materials Retailers, March 1935.

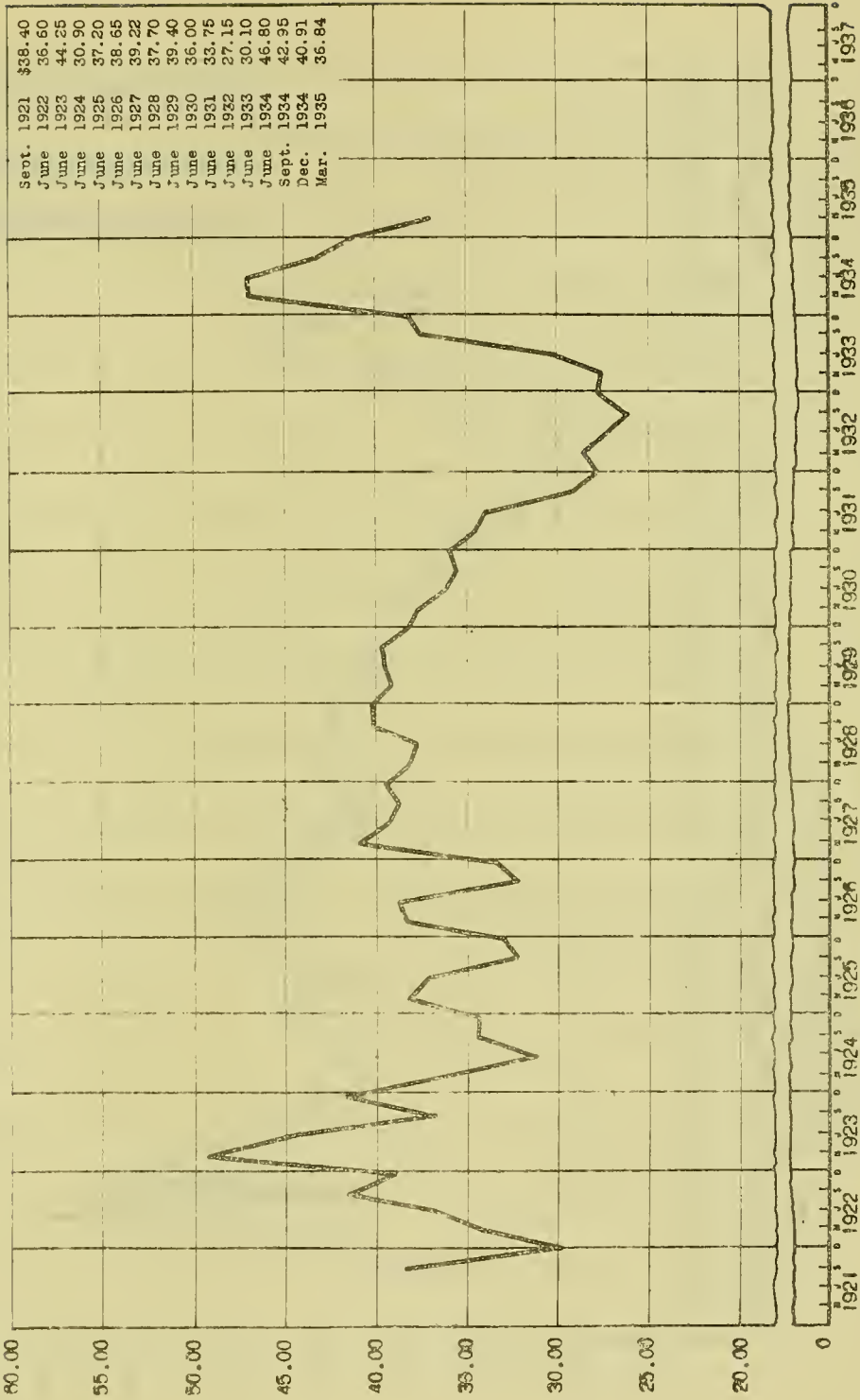


# CHART XX

## DOUGLAS FIR RETAIL PRICES-SEPT. 1921-MAR. 1935

No. 1 COMMON, 2'x4'x16', L.C.L. DELIVERED

Dollars  
Per 1000 Bd. Ft.



SOURCE: Bureau of Standards, Division of Building and Housing,  
"Building Materials Prices", Sept. 1921 to June 1935.  
Code Authority for Retail Lumber and Building Materials  
Products Industry, Sept. 1935 to Dec. 1934.  
Adjusted to N.R.A. from Retail Lumber Dealers Mar. 1935.

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Research and Planning Division

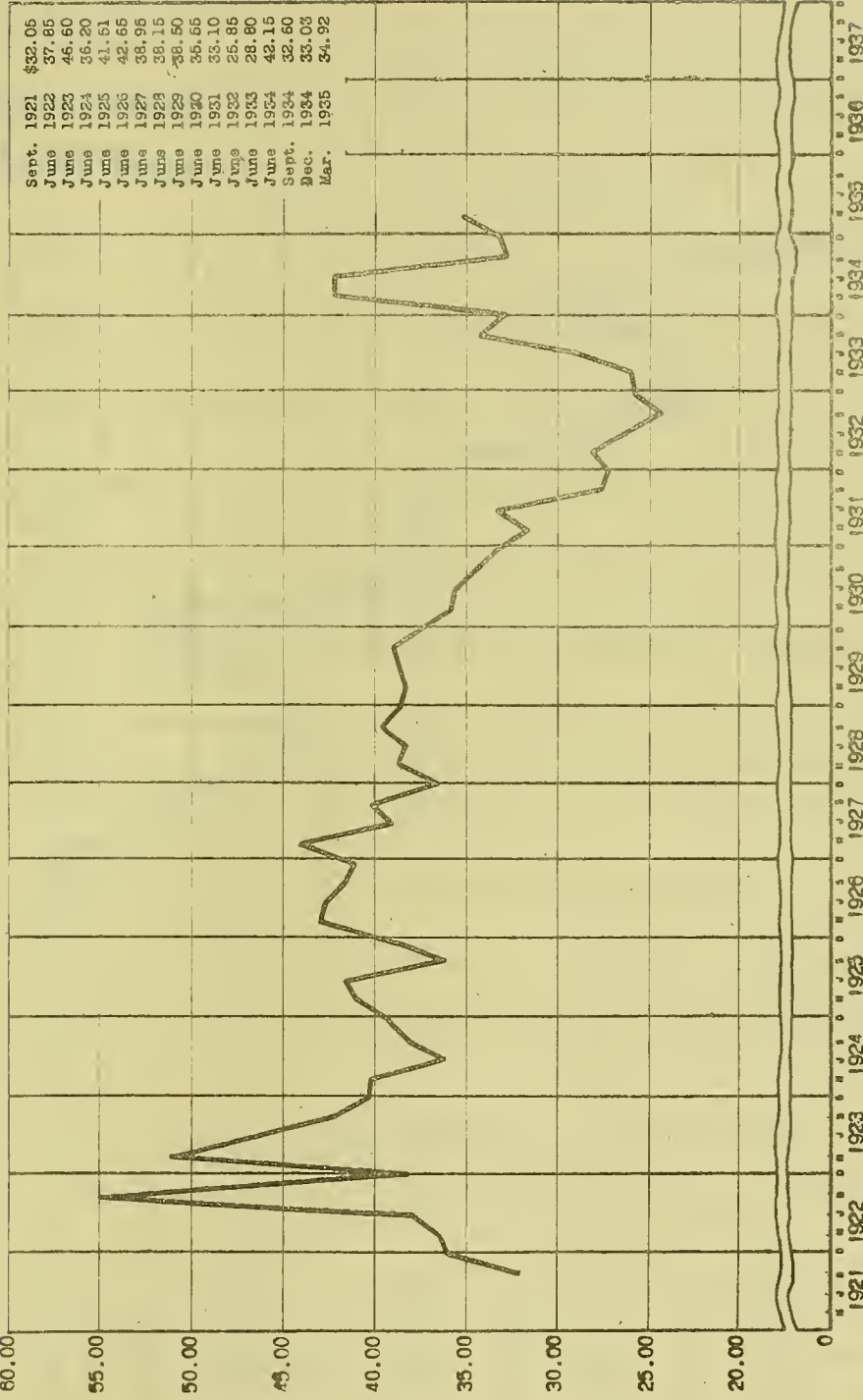


# CHART XXI

## SHORT LEAF YELLOW PINE RETAIL PRICES, - SEPT. 1921 - MAR. 1935

### No. 2 COMMON, "X6", RANDOM LENGTH, L.C.L. DELIVERED

Dollars  
Per 1000 Bd. Ft.



SOURCE: Bureau of Standards, Division of Building and Housing, "Building Materials Prices", Sept., 1921 to June 1933,  
Code Authority for Retail Lumber and Building Materials,  
Products Industry, Sept. 1933 to Dec. 1934,  
Reports to R.R.A. from Retail Lumber Dealers,  
Mar. 1935.

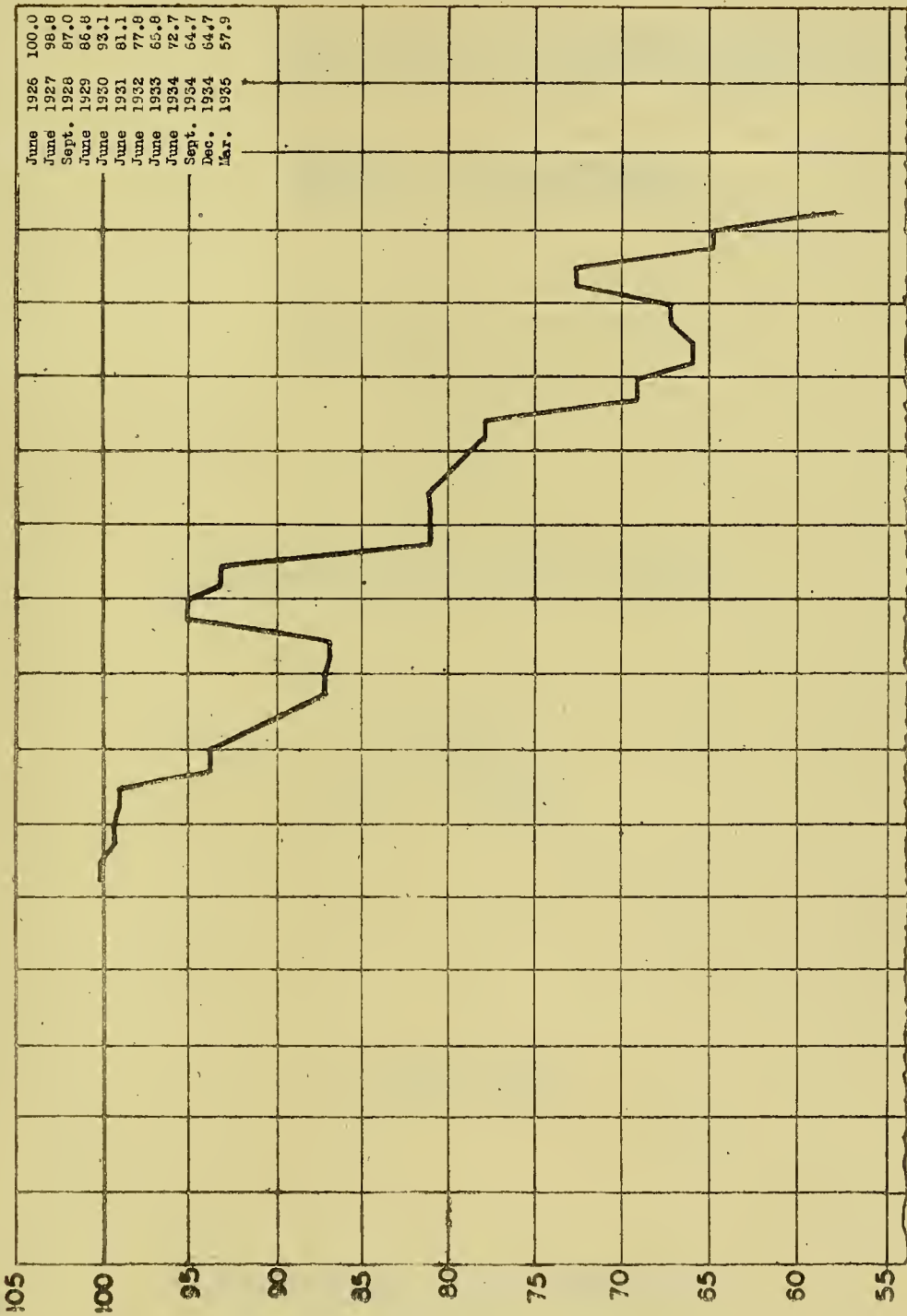
M. R. A.  
Research and Planning Division





# INDEX OF RETAIL PLUMBING FIXTURES PRICES.- MAR. 1926-MAR. 1935\*

INDEX  
NUMBERS  
1926= 100



1921 1922 1923 1924 1925 1926 1927 1928 1929 1930 1931 1932 1933 1934 1935 1936 1937

\* BASED UPON INDIVIDUAL SERIES FROM SEARS, ROEBUCK & CO. AND MONTGOMERY WARD CO. FOR BUILT-IN-TUB (5 1/2 FT. SINK (42" ROLLED RIM), AND CLOSET OUTFIT (28 1/2" HIGH), L.C.L. DELIVERED

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